



A Production of
The Personal Strategy Institute

How To Design a Personal Strategy for Living

Part 3 of 5

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Recap – What We Have Learned in Parts I, II

- 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
 - Now, in this episode we detail the process and steps for you to build YOUR personal strategy
 - Let's begin!

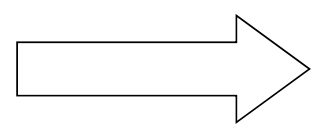


The Process for Building Personal Strategy

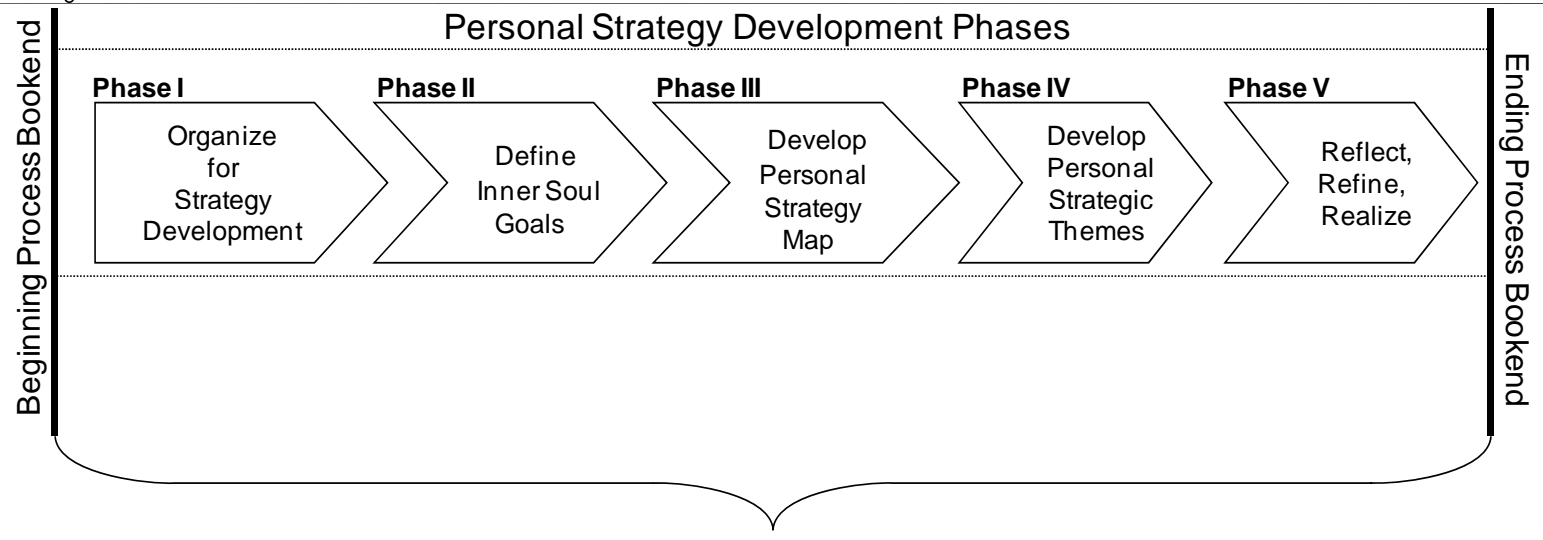
Overview: (5) Key Phases

Process for Building Personal Strategy

Process begins with defining personal strategy



Process ends with implementing personal strategy



Major Milestones That Occur Within the Process

Note: You can download FREE personal strategy toolbox templates from www.strategydrivenlife.com

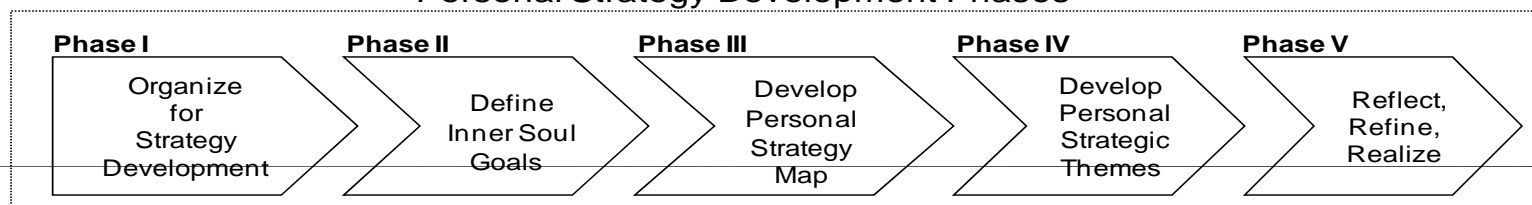


The Process for Building Personal Strategy

Detailed View: (5) Key Phases

Process for Building Personal Strategy

Personal Strategy Development Phases



Phase Steps

- Mentally commit to developing personal strategy
- Identify 'location of inspiration'
- Establish date/time to begin building personal strategy
- Gather notes/ideas regarding personal strategy

- Access soul
- Determine 'where you are'
- Determine 'where you want to be'
- Determine innate skills
- Overlay personal strategy building blocks
- Define inner soul goals
- Validate inner soul goals
- Identify life pathways / acknowledge commitments

- Complete life experience section of PSM
- Complete inner soul section of PSM
- Complete life pathways section of PSM
- Complete commitments section of PSM

- Complete ePSM section of PST
- Complete personal scorecard section of PST
- Complete action plan section of PST

- Assemble personal strategy
- Reflect on PSM (in isolation)
- Reflect on PST's (in isolation)
- Reflect on whole strategy
- Refine personal strategy
- Realize personal strategy

Outputs

- Location of inspiration identified
- Established date/time to begin
- Notes/ideas gathered

- Personal mission
- Personal vision
- List of inner soul goals
- List of life's pathways
- List of commitments

- Personal Strategy Map (draft)

- Personal Strategic Themes (draft)

- Personal Strategy Map (final)
- Personal Strategic Themes (final)

Enablers

- Solitude

- Solitude
- Personal strategy building blocks
- Personal strategy notes
- Music
- Voice recorder
- Location of Inspiration

- Solitude
- PSM Framework
- List of inner soul goals
- List of life's pathways
- List of commitments

- Solitude
- PST Framework
- Personal Strategy Map (draft)

- Solitude
- Personal Strategy Map (draft)
- Personal Strategic Themes (draft)



The Process to Build Personal Strategy

Phase I – Organize for Strategy Development

- Essence of Phase I is about mentally (and spiritually) committing to the need for and work of building a personal strategy for living
- In Phase I, you will need to:
 - Identify your ‘location of inspiration’ to facilitate discovering your inner soul goals
 - Establish a date and time to begin building personal strategy
 - Gather notes and ideas about your current goals and dreams
- The most important action when building personal strategy is to ‘access soul’; to converse with soul to determine one’s inner soul goals
- Identifying your ‘location of inspiration’ is about identifying a place where soul can emerge; where you can engage in quiet conversation with soul



The Process to Build Personal Strategy

Phase II – Define Inner Soul Goals Overview

- Phase II is arguably the most important phase of the process for building personal strategy
- Defining one's inner soul goals is about determining what you want in life and from life at this point in your life
- Suffice it to say, if we do not get this step right, we have nothing right. All our efforts will be for not as our strategy will be flawed.
- To prevent such calamity, we 'pause' to reveal wants, to define inner soul goals



What is an Inner Soul Goal?

- An inner soul goal...
 - Is a deeply felt want that is sourced from soul
 - Is a desire of soul
 - Represents what we want in life and from life
 - Is uniquely personal
 - Represents a substantive goal that is long-term by design
- Example inner soul goals are:
 - Start a business
 - Write a book
 - Earn a college degree
 - Beat addiction
 - Build a dream home
 - Obtain a private pilot license

Inner soul goals represent the foundation, core of personal strategy, if not one's life



On the Soul

- In 1841, Ralph Waldo Emerson remarked that “man is a stream who’s source is hidden”
- Few people know little to nothing of soul – what it is, how to converse with it, what it’s role is in our life, and how to leverage it for personal gain
- Because of this lack of knowing, the majority of people live diminished lives
- What is soul?
 - Soul represents, communicates the truth of who we are and were meant to be
 - Soul represents essence, before flesh, before bones, before matter
 - Soul is above such things and, therefore, is all things
 - Soul is the source of pure intention, of what to do with one’s life, of how to increase personal happiness, and of how to reengineer one’s life
 - It is from soul that we seek purpose, discover purpose, to realize purpose
- To reveal purpose requires revealing soul. How do we do this?
 - We reveal soul, learn from soul through conversation
 - Self must initiate conversation with soul, as soul lacks faculties to do so
 - We must view ourselves as an instrument, medium to bring soul forward, into the present, onto the surface of life, for self to live as soul would live



Reasons Why / Benefits Of Conversing with Soul

Reasons Why –

- To obtain the truth of who we are and were meant to be
- To learn desires of soul
- To create personal strategy reflecting soul
- To set soul free; unleash spirit within
- To discover emerging you
- To obtain 'wisdom awareness'
- To reorient one's perception from self to soul
- To initiate new cause, realize new effect

Benefits Of –

- Ignites divine will
- Results in improved quality of life
- Eliminates disconnectedness
- Quells the suffering
- Removes fragmentation/ separation between self and soul
- Enables operating from soul as one's center
- Ensures defining high quality, effective personal strategy
- Enables living as soul would live

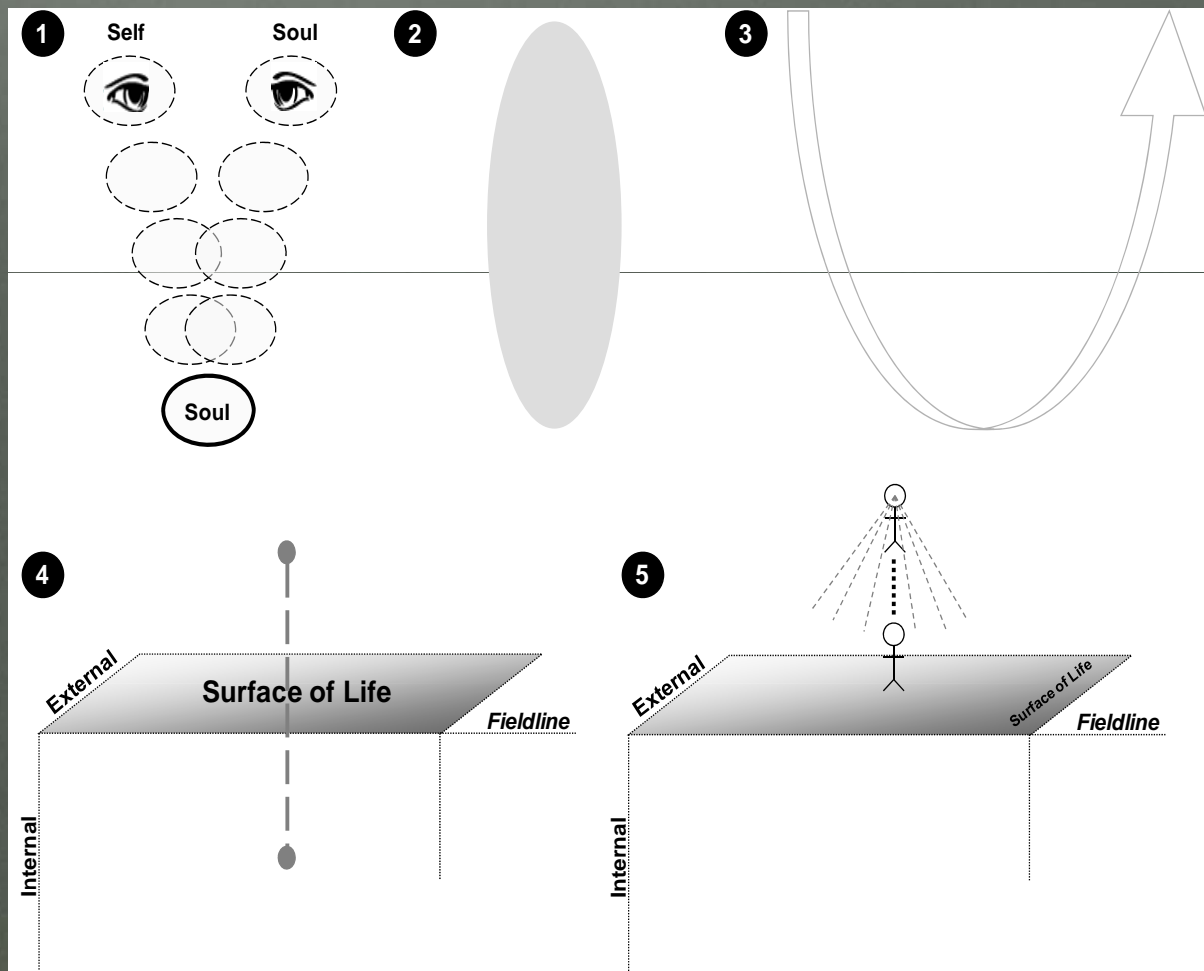


Descending Within

Overview

- What does it mean to 'descend within'?
 - To descend within is to force reflection of self upon self; to shut down external and ignite internal
 - To descend within is to descend past habitual self to see emerging self
- To descend within, we 'suspend' self to redirect our seeing, thinking on 'what could be' rather than 'what is'
- Descending within is the mechanism that liberates us from our past to realize a more fragrant future
- To descend within, it often requires we focus our mind's eye on one or more meditative symbols

Descending Within Meditative Symbols



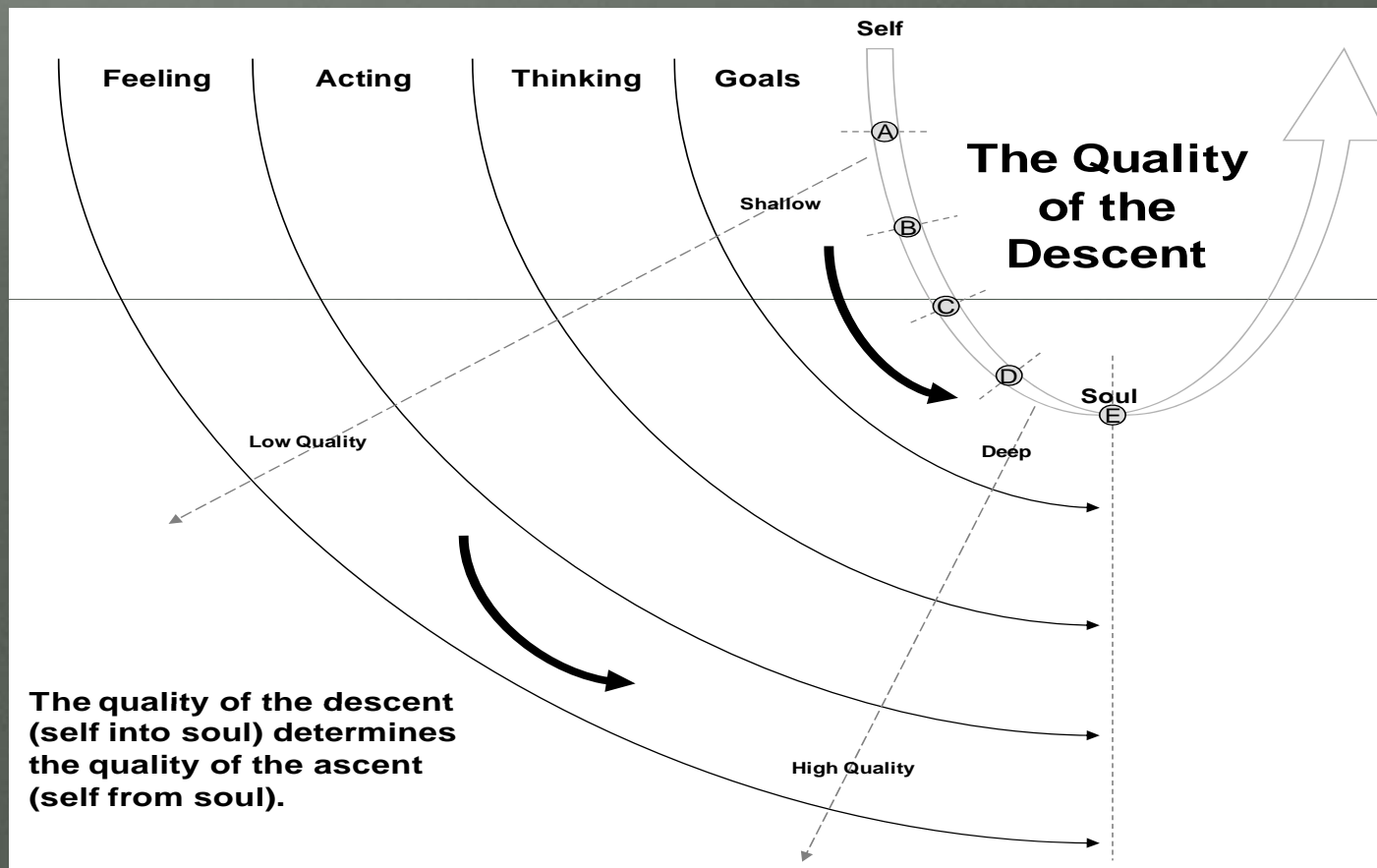
(5) Symbols:

- Merging circles
- The Quiet Room
- Union or 'U'
- Surface of life/
Divine Fieldline
- Rise



Descending Within

Quality of the Descent



How you progress on the inside – the depths to which you crawl – determines how you progress on the outside – degree of personal, professional, and financial success



Reaching Soul

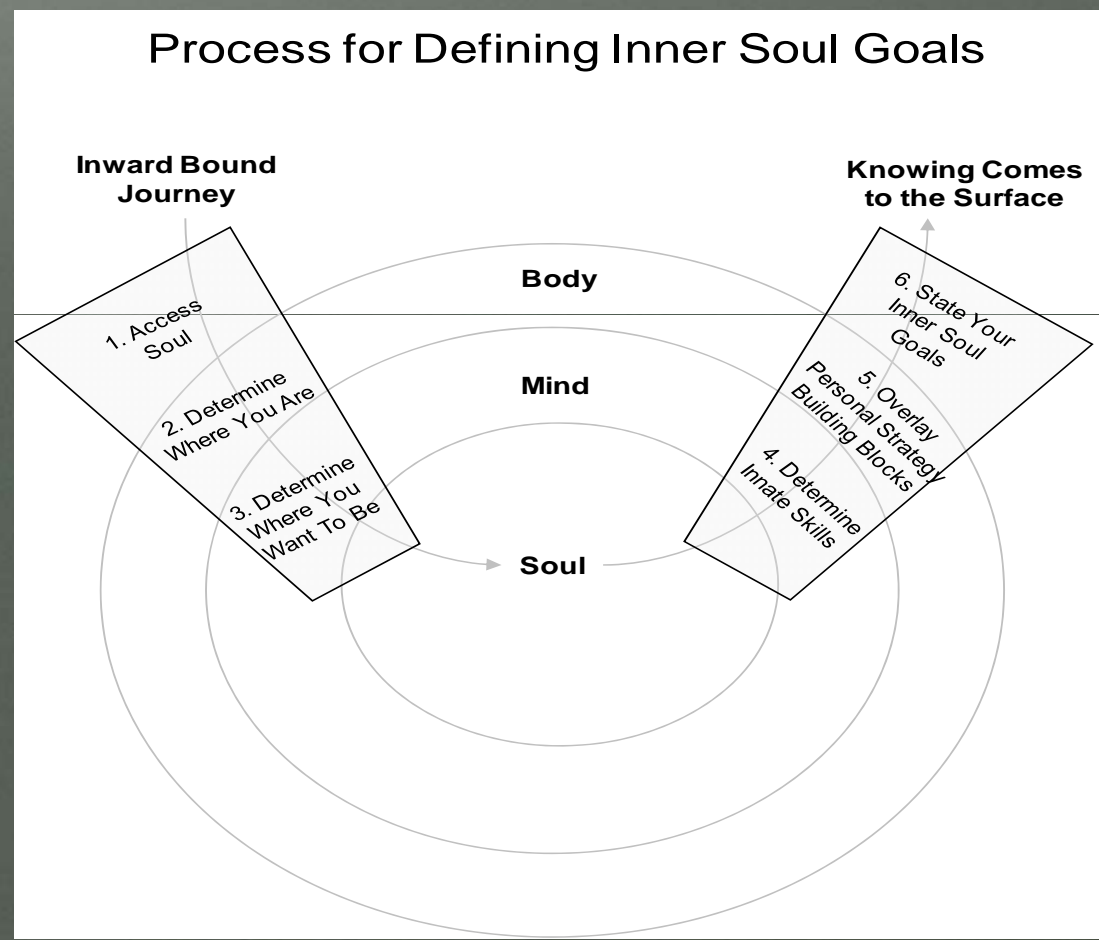
How do you know if you have reached soul?

- Reaching soul, connecting with soul may take hours, days, or weeks depending on where you currently operate
- When one reaches soul, there is no deciding what to do with your life as such things come naturally, become obvious
- As you descend within, if you are consciously, mentally 'deciding' what to do with your life, you have not yet entered the quiet room
- When one reaches soul, begins to converse with soul, the mind has NO role, as the conversation is more about knowing than deciding; it is more about feeling than thinking; it is more a matter of one's heart than one's head
- How do you know if you have reached soul?
 - The short answer: you will feel it
 - The long answer:
 - A profound knowing consumes you; you feel connected with something larger than your-self
 - You exist in an 'altered state'; you are not the same person exiting conversation, as when entered
 - What you see has changed, what you think has changed, life purpose has changed
 - When 'what to do' with your life become obvious
 - You have increased awareness of: 1) who you are and 2) were meant to be on the surface of life
 - You are inspired, excited, and possess new hope
 - Self and soul are One; once operating as parts, now made whole



Process to Define Inner Soul Goals

Overview



The process for defining inner soul goals is an inward bound journey beyond flesh, beyond mind, into soul where profound knowing comes to the surface



Process to Define Inner Soul Goals

Step 1 – Access Soul - I

- Accessing soul is similar to prayer or meditation in that the goal is to turn one's attention inward, back onto self
- Prayer or meditation are enables, as both create the conditions to access soul
- To create the conditions to access soul, or, as Emerson remarked, “to put myself in an attitude of reception” requires the following:
 - Silence
 - Closing one's eyes
 - Calming one's thoughts
 - Suspending habitual self
 - Questioning
 - Listening
 - Patience
 - Remaining open minded
 - Time
- To create right conditions, other enables include:
 - Solitude
 - Music
 - Location of inspiration



Process to Define Inner Soul Goals

Step 1 – Access Soul - II

- Tactical steps to access soul are:
 - Step 1a – Stop your life
 - Step 1b – Get comfortable
 - Step 1c – Breath in air
 - Step 1d – Listen to your breathing
 - Step 1e – Step outside self to see self
- The reason we focus on breathing is that focusing on one's breath brings mind and matter together
 - Distractions begin to fade
 - Parts become whole
 - Once competing interests, now working towards a common goal

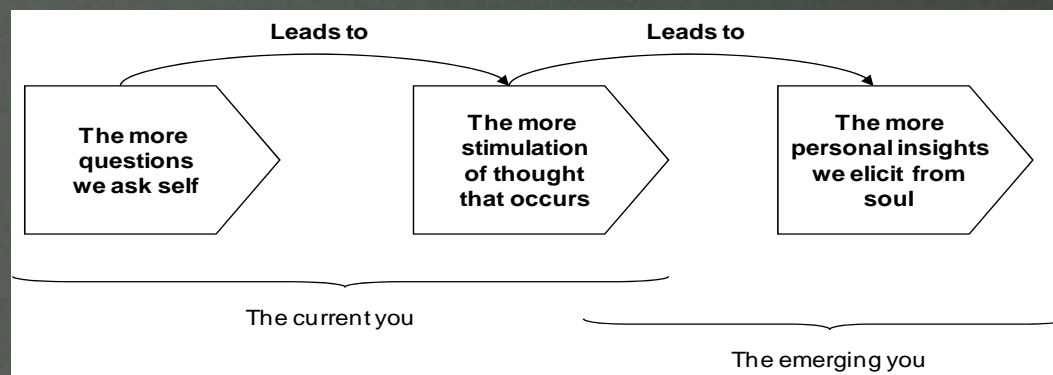


Process to Define Inner Soul Goals

Step 1 – Access Soul - III

- Having reached a state of total relaxation, you are ready to 'access' soul
- Relaxation has enabled descent, opened the door to The Quiet Room for you to converse with soul. All that remains is for you to pass through the door
- How do we do this? By questioning self
- How does questioning self prompt soul; allow us to reach soul? It is because asking questions:

- Stimulates thought
- Facilitates introspection
- Leads to listening
- Demands answers
- Yields insights
- Leads to profound learning

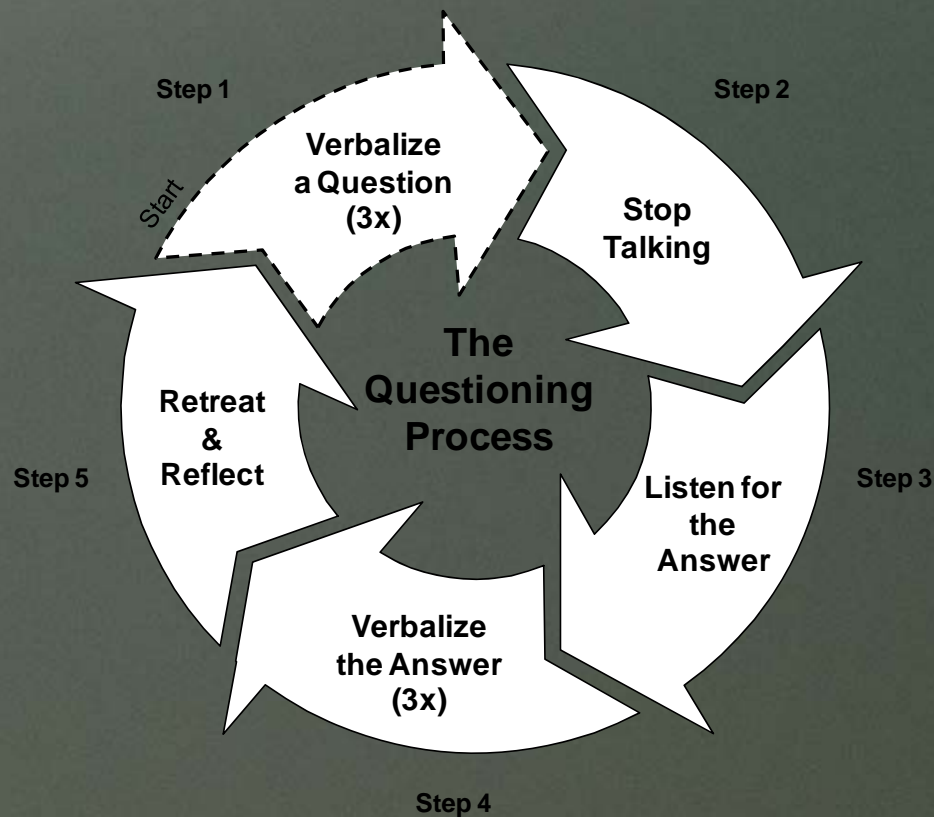




Process to Define Inner Soul Goals

Step 1 – Access Soul - IV

- Asking questions, with a goal of determining one's inner soul goals is perhaps the most important line of questioning in which you will ever engage
- There is a process we follow when questioning self:





Process to Define Inner Soul Goals

Step 2 – Determine Where You Are - I

- To determine ‘where we are’, we ask three sets of questions:
 - Baseline (are frontline questions into soul; they are direct, probing, and personal)
 - Innate skill
 - Personal strategy building blocks
- Baseline questions:
 - *On Work*
 - Are you happy in your current profession and role?
 - Does your life’s work make sense to you?
 - Does your life’s work reflect your passion?
 - Does your chosen profession fulfill you, challenge you, inspire you?
 - How do you feel in the morning when embarking on a new day in your chosen profession?
 - Are you making the kind of contribution to society, to the world, that is meaningful and makes you proud?
 - At the end of your working days, will you recognize what you have accomplished? Will anyone recognize what you have accomplished?
 - Will you leave this world a better place because of your life’s contributions, your life’s work?



Process to Define Inner Soul Goals

Step 2 – Determine Where You Are - II

- *On Surroundings*
 - Are you living in the right location?
 - If not, how do you know? What are the signs?

- *On Life Partner*
 - Are you with the right life partner?
 - If not, how do you know? What are the signs?

- *On Soul*
 - What is the state of your soul?
 - When you are alone, what does soul say?
 - Are you doing what you want in life?
 - Are you getting what you want from life?
 - Is life meaningful, purposeful?
 - Do you desire a new life story?
 - Are you living as soul would live?



Process to Define Inner Soul Goals

Step 2 – Determine Where You Are - III

- *On Spirit*
 - What is the condition of your spirit?
 - Is spirit alive or sleeping somewhere cold?
 - Are you living an inspired existence?
 - Is life fragrant, vibrant, full of color?
- *On Feeling*
 - What do you feel inside?
 - How do you feel about life, living?
 - Do you feel alive?
 - Are you happy with where you are at personally, professionally, financially?
 - Do you feel inner conflict between where you are and where you want to be?
 - Do you feel inner conflict between who you are and who you want to be?
- If not done so already, record soul's response to all questions asked as the answers to such questions represent the 'raw material' to begin shaping your inner soul goals



Process to Define Inner Soul Goals

Step 3 – Determine Where You Want to Be - I

- Knowing ‘where we are’ is the Yin to the Yang of knowing ‘where we want to be’
- To identify where we want to be, we begin by asking these two questions:
 - What is my mission in life?
 - What is my vision for self?
- Creating a personal mission/vision statement provides us context for how we should operate on the surface of life
- With mission and vision providing context, we align all aspects of self and life (seeing, willing, thinking, acting) to achieve mission, realize vision



Process to Define Inner Soul Goals

Step 3 – Determine Where You Want to Be - II

- To craft your mission statement, answer the following questions. The collective response from soul will reveal your personal mission:
 - Why are you here on earth?
 - What do you value?
 - Why do you work?
 - What is your purpose in life?
 - What is soul telling you to do?
 - What will be your legacy from having walked the earth?
- To craft your vision statement, answer the following questions. The collective response from soul will reveal your personal vision:
 - Who do you want to become on the surface of life?
 - How do you want to be remembered?
 - Will the world have known your name?
 - How will they have known your name?
 - What will become of you?



Process to Define Inner Soul Goals

Step 4 – Determine Innate Skills - I

- What are innate skills?
 - Innate skills are those things that you are naturally good at and enjoy doing
- Some people are born with immense innate skill; we call such people ‘gifted’
 - The exceptional athlete
 - The brilliant mathematician
 - The animated artist
 - The roused musician
 - The divine orator
- Knowing one’s innate skills is of great importance (and relevance) when designing personal strategy, as one can define precise goals that leverage natural strengths
- For example:
 - {skilled communicator, problem solving skills, creative} → mgmt consultant, acct exec, trainer
 - {good with hands, create, enjoy challenges} → carpenter, artist, interior designer
 - {deep connection with nature, enjoy travel, strong} → park ranger, river guide, hiking instructor



Process to Define Inner Soul Goals

Step 4 – Determine Innate Skills - II

- Knowing your innate skills will enable you to identify which professions/roles cater to and will leverage your innate strengths
- Identifying one's innate skills begins with asking questions to identify one's strengths:
 - What am I naturally good at?
 - What have I excelled at?
 - What do I enjoy doing on the weekends?
 - What do my friends say I am naturally good at?
 - What do people complement me on?
 - What have my current and former employers said about my strengths?
 - What do I enjoy doing that never feels like work?
 - What did I enjoy doing as a child?
 - What are my passions?
 - If money were not an issue, what work would I pursue?
 - What would I like to do if I could start my career over?
- Take time to scan your life when answering these questions. Think over your professional career, weekend hobbies, and outside interests for ideas



Process to Define Inner Soul Goals

Step 4 – Determine Innate Skills - III

What are you naturally good at and enjoy doing? Check all that apply.

<input type="checkbox"/> Fixing things	<input type="checkbox"/> Risk taker	<input type="checkbox"/> Hosting events	<input type="checkbox"/> Managing property
<input type="checkbox"/> Leading others	<input type="checkbox"/> Sales	<input type="checkbox"/> Caring for the sick	<input type="checkbox"/> Giving massages
<input type="checkbox"/> Writing	<input type="checkbox"/> Painting	<input type="checkbox"/> Outdoor planning	<input type="checkbox"/> Computer skills
<input type="checkbox"/> Negotiation	<input type="checkbox"/> Teaching others	<input type="checkbox"/> Motivating others	<input type="checkbox"/> Cutting hair
<input type="checkbox"/> Problem solving	<input type="checkbox"/> Cooking	<input type="checkbox"/> Caring for children	<input type="checkbox"/> Beautifying yards
<input type="checkbox"/> Speaking	<input type="checkbox"/> Counseling others	<input type="checkbox"/> Photography	<input type="checkbox"/> Organizing
<input type="checkbox"/> Driving/navigating	<input type="checkbox"/> Carpentry	<input type="checkbox"/> Telling jokes	<input type="checkbox"/> Singing
<input type="checkbox"/> Needlework	<input type="checkbox"/> Drawing	<input type="checkbox"/> Listening	<input type="checkbox"/> Reading
<input type="checkbox"/> Typing	<input type="checkbox"/> Flower arranging	<input type="checkbox"/> Inventing things	<input type="checkbox"/> Preaching
<input type="checkbox"/> Shopping	<input type="checkbox"/> Flying airplanes	<input type="checkbox"/> Dancing	<input type="checkbox"/> Extreme sports
<input type="checkbox"/> Planning vacations	<input type="checkbox"/> Telling stories	<input type="checkbox"/> Maintaining fitness	<input type="checkbox"/> Modeling
<input type="checkbox"/> Piloting a boat	<input type="checkbox"/> Leading hikes	<input type="checkbox"/> Housekeeping	<input type="checkbox"/> Growing plants
<input type="checkbox"/> Lawn care	<input type="checkbox"/> Critiquing books	<input type="checkbox"/> Talking on phone	<input type="checkbox"/> Using your hands
<input type="checkbox"/> Other []	<input type="checkbox"/> Other []	<input type="checkbox"/> Other []	<input type="checkbox"/> Other []
<input type="checkbox"/> Other []	<input type="checkbox"/> Other []	<input type="checkbox"/> Other []	<input type="checkbox"/> Other []



Process to Define Inner Soul Goals

Step 4 – Determine Innate Skills - IV

If you retired today,
what would you do?

Travel the world?	Fly airplanes?	Start public garden?
Create custom furniture?	Be public speaker?	Start a ministry?
Start a school?	Write a book?	Become a river guide?
Start a newspaper?	Create art?	Start a magazine?
Start a winery?	Entertain others?	Become a social worker?
Join the peace corp?	Breed horses?	Teach college classes?
Create documentaries?	Own a farm?	Start a not-for-profit?



Process to Define Inner Soul Goals

Step 4 – Determine Innate Skills - V

What have you achieved?

List of awards you have received

List of accomplishments



Process to Define Inner Soul Goals

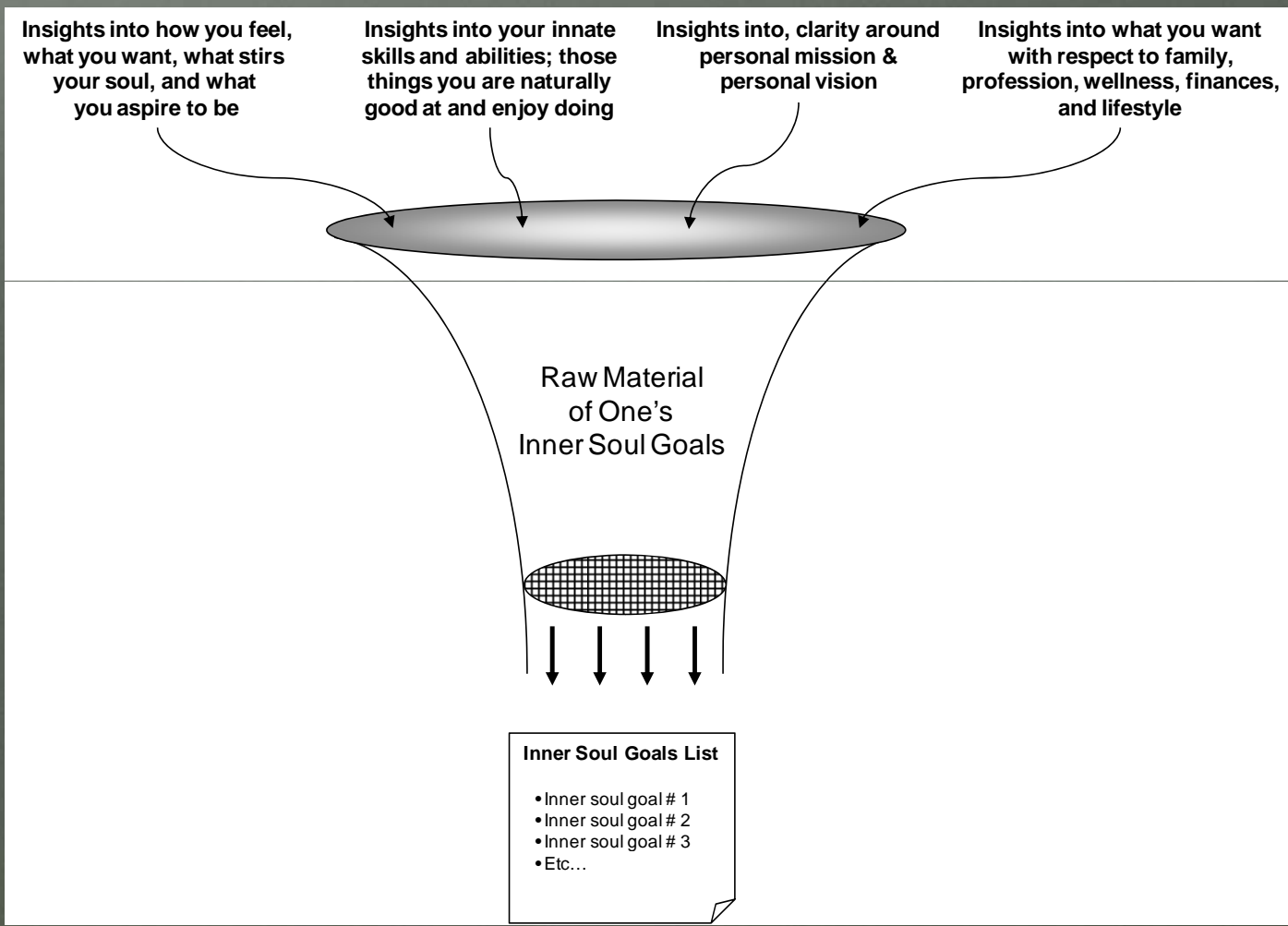
Step 5 – Overlay Personal Strategy Building Blocks - I

- To complete our questioning of self, we take accumulated insights, consider them from the perspectives of each personal strategy building block, and overlay them onto said building blocks
- We use the personal strategy building blocks to spur thought, organize thought, and help refine what we want in life and from life at this point in life
- The questions we ask self are:
 - What do you want to change in your life regarding *family*?
 - What do you want to change in your life regarding *profession*?
 - What do you want to change in your life regarding *wellness*?
 - What do you want to change in your life regarding *finances*?
 - What do you want to change in your life regarding *living leisurely*?



Process to Define Inner Soul Goals

Step 5 – Overlay Personal Strategy Building Blocks - II





Process to Define Inner Soul Goals

Step 6 – State Your Inner Soul Goals - I

- Let us recap your conversation with soul:
 - You asked questions to obtain insights into how you feel, what you want, what stirs your soul, and what you aspire to be
 - You asked questions to obtain insights into your innate skills and abilities – those things you are innately good at and enjoy doing
 - You asked questions to obtain insights into, clarity around personal mission, personal vision
 - You asked questions relative to the building blocks of personal strategy to obtain insights into what you want with respect to family, profession, wellness, finances, and lifestyle



Process to Define Inner Soul Goals

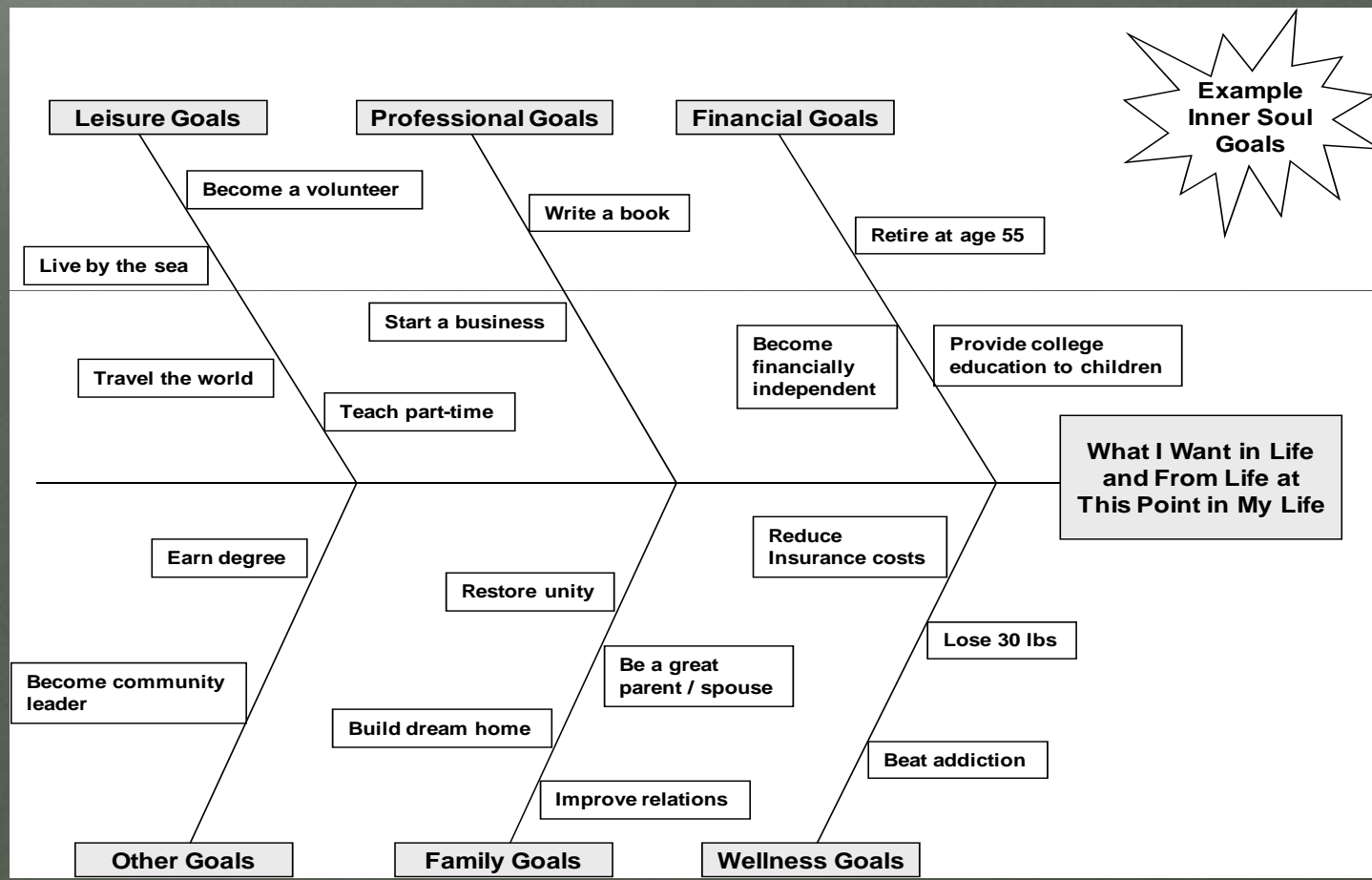
Step 6 – State Your Inner Soul Goals - II

List your (candidate) inner soul goals below:

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



Ranking, Reducing, and Validating Your Goals - I



You only want to pick 5-7 inner soul goals



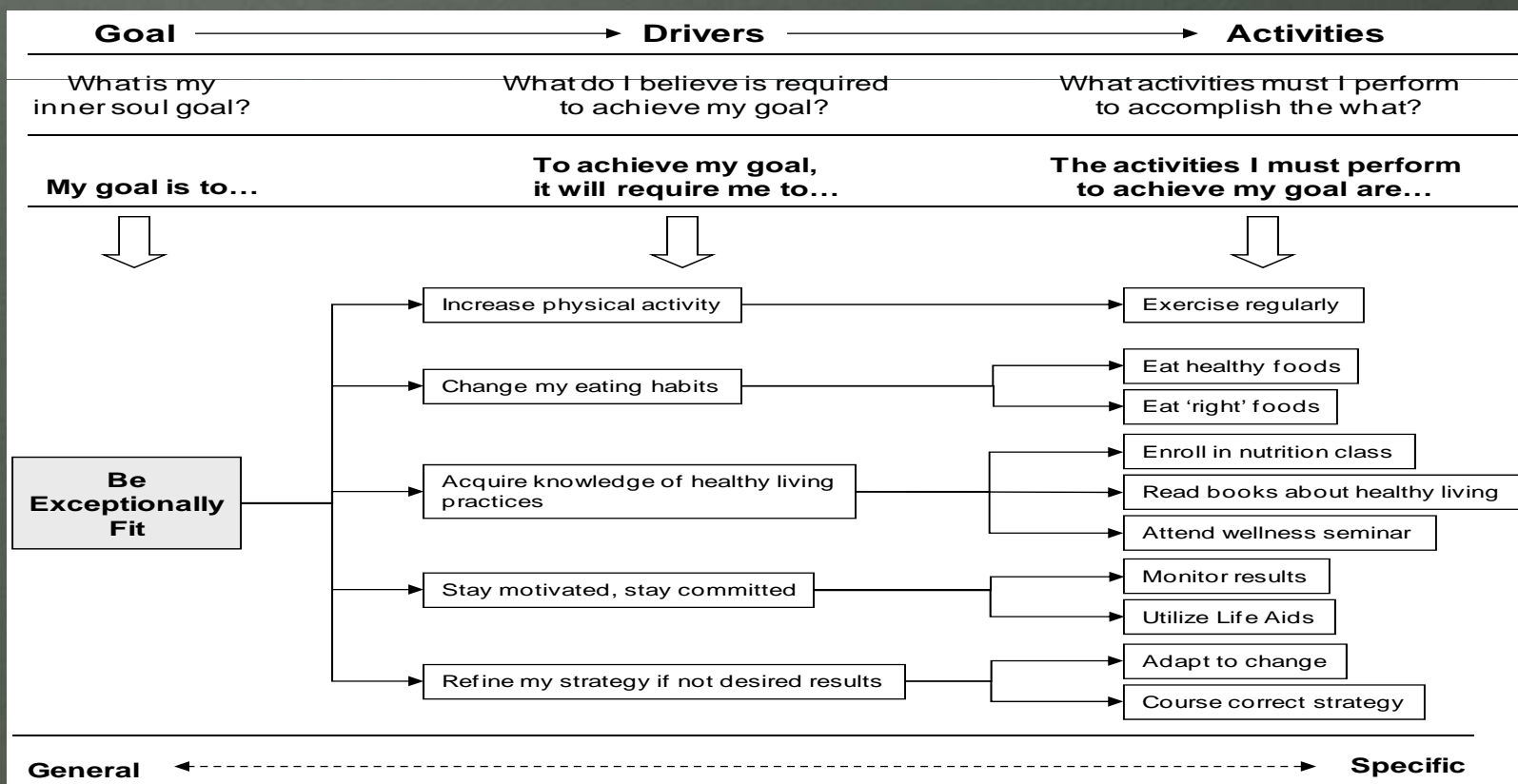
Ranking, Reducing, and Validating Your Goals - II

- To rank and reduce your goals to identify the top 5-7, simply assign a value from 1-10 to each goal. 10 represents your highest priority goals and 1 represents your lowest priority goals
- After you assign points, simply assemble the list in descending order to determine your top goals
- Once you have finalized your 'vital few' goals, the next step is to perform a quality check of such goals
- To do this, we ask for each goal, 'Why am I pursuing this goal?'
 - Asking this question at this late stage will ensure that you have a emotional, spiritual connection to the goal
 - If, upon reflection, you cannot find compelling reason(s) to pursue a goal, you must drop the goal as we have no time to lose



Identifying Life Pathways - I

- Once we define our inner soul goals, we then need to identify the life pathways required to achieve such goals
- The question is: 'How does one identify which activities are the 'right' activities to achieve a goal?'





Identifying Life Pathways - II

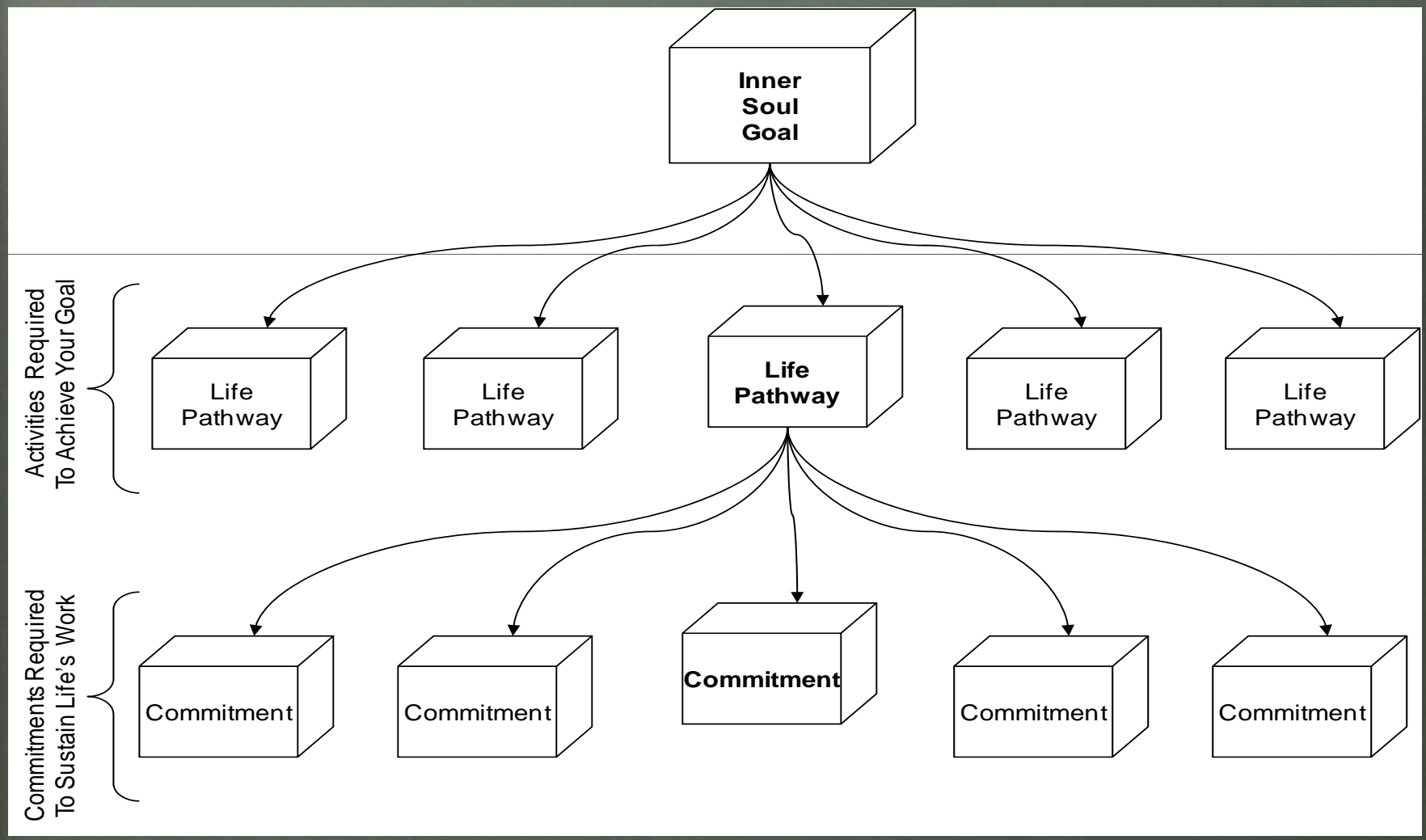
Inner Soul Goal: _____

Life Pathway: _____



Inner Soul Goals, Life Pathways, Commitments

Bringing It All Together





The Process to Build Personal Strategy

Phase III – Develop Personal Strategy Map Overview

- Phase III steps include:
 - Completing the Life Experience section of the Personal Strategy Map
 - Completing the Inner Soul section of the Personal Strategy Map
 - Completing the Life Pathways section of the Personal Strategy Map
 - Completing the Commitments section of the Personal Strategy Map
- Phase III outputs include:
 - Personal Strategy Map (draft)
- Phase III enablers include:
 - Solitude
 - PSM Framework
 - List of inner soul goals, life pathways, and commitments



Developing Personal Strategy Map

Defining Life Experience

- To define the Life Experience component of a PSM is to make explicit the type of life you hope to live
- We do this by reviewing our list of inner soul goals and then defining the hoped-for outcomes you expect to realize from achieving each goal
- For example:
 - If you had a goal to ‘start a business’, you would ask, ‘What are my hoped-for outcomes from achieving this goal?’
 - You might identify these outcomes:
 - Greater personal freedom
 - Increased happiness
 - Increased meaning in life
 - Greater income
 - Increased motivation to work
 - Greater desire to work
 - Greater flexibility
- Once you identify how you (and those around you) benefit from achieving your goals, the next step is to align each outcome with a dimension of the life experience
- At this time, complete the life experience section of your PSM



Developing Personal Strategy Map

Defining Inner Soul Goals

- To complete the inner soul component of your PSM, simply transpose your goals from your inner soul goals list onto the PSM template
- When recording your inner soul goals, consider these guidelines:
 - State one goal per oval
 - Use phrasing such as 'Want to xxx'
 - Limit the number of inner soul goals to between five and seven
 - It is ok to state your goals in general terms (e.g. want to be exceptionally fit) vs. more precise terms (e.g. want to lose 30 lbs by Dec 31st); you will get more precise when defining your PSTs
- At this time, complete the inner soul section of the PSM



Developing Personal Strategy Map

Defining Life Pathways

- In Phase II, you should have identified the high-level personal processes needed to achieve your goals
- To document life pathways, simply transpose each personal process identified during Phase II beneath its related life pathway category on the PSM template
- For example,
 - If one of your inner soul goals was to ‘be a teacher’, and to achieve this goal it required you develop new skills and capabilities, then beneath the profession life pathway grouping, you would record the following personal processes:
 - Develop teaching skills
 - Acquire knowledge of teaching practices
 - Develop teaching capabilities
 - Obtain teaching certificate
 - Perform job search
- It is best to record life pathways in verb-noun format, as this is a crisper way to document needed action
- At this time, complete the life pathways section of your PSM



Developing Your Personal Strategy Map

Defining Commitments - I

- When brainstorming for commitments in Phase II, it is likely that many of the commitments you identified to support one life pathway actually support several, if not all, life pathways

Inner Soul Goal	Mental Commitment	Physical Commitment	Resource Commitment
Be exceptionally fit	<ul style="list-style-type: none"> ✓ Keep goal top of mind ✓ See myself as I am – out of shape ✓ Commit to exercise ✓ Commit to healthy eating ✓ Commit to paying the price 	<ul style="list-style-type: none"> ✓ Eat healthy food ✓ Exercise regularly ✓ Read health magazines/articles ✓ Monitor results ✓ Reflect on results ✓ Adapt to change 	<ul style="list-style-type: none"> ✓ Allocate time to exercise ✓ Allocate funds to purchase exercise equipment/clothes and/or club membership ✓ Allocate funds to purchase dietary foods/supplements
Start a business	<ul style="list-style-type: none"> ✓ Keep goal top of mind ✓ Commit to paying the price ✓ Other... ✓ Other... 	<ul style="list-style-type: none"> ✓ Monitor results ✓ Reflect on results ✓ Adapt to change ✓ Other... 	<ul style="list-style-type: none"> ✓ Allocate time to... ✓ Allocate funds to... ✓ Other... ✓ Other...
Help disadvantaged children	<ul style="list-style-type: none"> ✓ Keep goal top of mind ✓ Commit to paying the price ✓ Other... ✓ Other... 	<ul style="list-style-type: none"> ✓ Monitor results ✓ Reflect on results ✓ Adapt to change ✓ Other... 	<ul style="list-style-type: none"> ✓ Allocate time to... ✓ Allocate funds to... ✓ Other... ✓ Other...



Developing Your Personal Strategy Map

Defining Commitments - II

- As you complete the commitments section of your PSM, do not be concerned if many of the same commitments span multiple goals
- The two forms of commitment in which we expect redundancy are mental commitment (pay-the-price) and resource commitment (time)
- When completing the commitments section on the PSM template, the goal is to transpose all commitments you identified in Phase II beneath the proper heading (mental, physical, resource)
- Only record unique commitments even though redundancy may exist across goals
- At this time, complete the commitments section of your PSM

Developing Personal Strategy Map

Summary



- A Personal Strategy Map **offers us...**
 - A framework to define, organize, document, and communicate what we want in life and from life, throughout life
 - A single repository to capture the raw material of personal strategy (inner soul goals, life pathways, and commitments)
 - A single document that reflects our current life strategy to maximize the personal, professional, and financial potential that life offers
- A Personal Strategy Map **tells us...**
 - How to achieve our goals by performing specific life pathways, backed by commitment
 - No goal or dream is too big, too complex, too out of reach, too impossible to achieve with a personal strategy
 - The 'system', or assemblage of personal strategy components (cause and effect relations) that will help us achieve our goals
- A Personal Strategy Map **enables us...**
 - To confidently take on the world; to rise up, and experience a lifetime of happiness, meaning, and achievement
 - To serve as author and lead actor in designing and deploying a new life plan; to realize a different life story
 - To seize opportunity and meet imperative



The Process to Build Personal Strategy

Phase IV – Develop Personal Strategic Themes Overview

- Phase IV steps include:
 - Completing the ePersonal Strategic Map section of the Personal Strategic Theme
 - Completing the Personal Scorecard section of the Personal Strategic Theme
 - Completing the Action Plan section of the Personal Strategic Theme

- Phase IV outputs include:
 - Personal Strategic Themes (draft)

- Phase IV enablers include:
 - Solitude
 - PST Framework
 - Personal Strategy Map (draft)



Developing Personal Strategic Themes

Defining your ePSM

- Upon developing high-level strategy to achieve all our goals (via PSM) our focus deepens to develop more precise strategy to achieve specific goals
- We begin by stating a theme for our PST (which equates to an inner soul goal)
- We define personal strategy one theme or one PST at a time, as each PST requires defining unique strategy
- Steps to complete your ePSM:
 - Using the PST template as your guide, record the PST theme name in the space provided at the top of the ePSM section
 - Next, record your inner soul goal within the inner soul section of the ePSM
 - Next, record the personal processes to achieve this goal in the life pathways section of the ePSM
 - Finally, record the mental, physical, and resource commitments to sustain process work
 - When these sections are complete, specify the dimensions of the life experience (e.g. financial, family, wellness, professional) that benefit from achieving your goal
 - Lastly, define goals explicitly on a component-by-component basis
- Note: this is now the time to reexamine, challenge, and refine stated life pathways and commitments to ensure that both will drive achieving your inner soul goal



Developing Personal Strategic Themes

Defining Your Personal Scorecard - I

- Once you complete the detailed strategy to achieve your inner soul goal (i.e., theme), the next step in developing your PST is to identify the performance measures to monitor progress towards goal achievement
- Not all goals identified in your ePSM will have a companion measure
- Generally, it is best to limit the number of performance measures on a PST to between three and five measures
- We are looking for those measures that best serve as personal progress meters to achieve your inner soul goal
- Listed below are characteristics of good scorecard measures:
 - Aligns with a support goal
 - Indicates progress with achieving one's inner soul goal
 - Drives achievement of one's inner soul goal
 - Indicates effectiveness with performing life's pathways (or)
 - Indicates effectiveness with maintaining commitment (or)
 - Indicates effectiveness of action plan initiatives/tasks
- Specify target values (i.e., stretch goal) for each measure
- Skew your measures such that most align with life pathways and commitments

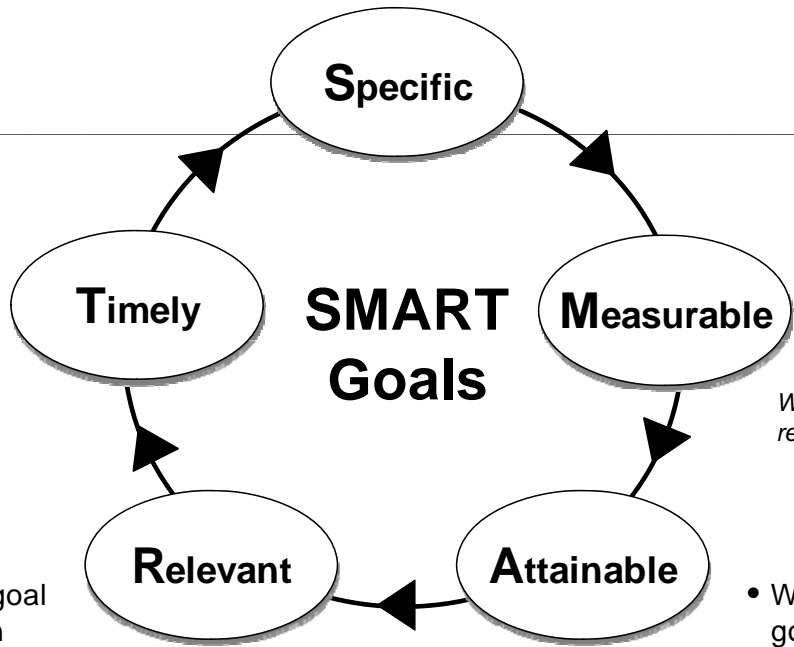


Developing Personal Strategic Themes

Defining Your Personal Scorecard - II

- A specific goal has a much better chance of being accomplished than a general goal

What is the desired end result?



- A goal should be grounded within a time frame. With no time frame tied to it, there is no sense of urgency
- When does this goal have to be completed?*

- Establish concrete criteria for measuring progress toward the attainment of each goal you set
- What will tell us that we've reached our desired outcome?*

- To be relevant, a goal must represent an objective toward which you are both *willing* and *able* to work
- Why is this goal important?*

- When you identify goals that are most important to you, you begin to figure out ways you can make them come true
- Can this really be done?*



Developing Personal Strategic Themes

Defining Your Action Plan

- Action plans detail our 'opening moves' to achieve both support goals and our inner soul goal
- To identify the 'right' opening moves, it requires performing a systemic review of all components on your PST
- What is important when developing an action plan is that it be more 'directionally correct' than precise
- If all your initiatives/tasks focus on achieving your goal(s), you can feel reasonably confident that you have identified the 'right' opening moves
- At this time, detail the initiatives and tasks that constitute your action plan including defining a budget for those tasks requiring funding

PST Component	Question to Ask
Life Pathways	<ul style="list-style-type: none"> • What specific initiatives/tasks must I perform relative to the personal processes identified in the life pathways section? <p><u>Example:</u> Inner soul goal: Be exceptionally fit Life pathway: Exercise regularly Opening move: Develop exercise calendar</p>
Commitments	<ul style="list-style-type: none"> • What specific initiatives/tasks must I perform to maintain commitments to sustain life's work? <p><u>Example:</u> Inner soul goal: Be exceptionally fit Physical commitment: Avoid sugar Opening move: Dispense high sugar foods</p>
Support Goals	<ul style="list-style-type: none"> • What specific initiatives/tasks must I perform to achieve both my support goals and my inner soul goal? <p><u>Example:</u> Inner soul goal: Be exceptionally fit Support goal: Establish habit to reflect daily Opening move: Develop reflection calendar</p>
Measures	<ul style="list-style-type: none"> • What specific initiatives/tasks must I perform to measure life performance; to indicate if my strategy is working? <p><u>Example:</u> Inner soul goal: Be exceptionally fit Measure: # workouts/week Opening move: Create exercise log</p>

Developing Personal Strategic Themes

Summary



- A Personal Strategic Theme **offers us...**
 - A framework to define, organize, document, and communicate tactical-level strategy to achieve a goal
 - An approach to reduce complexity when developing personal strategy while adding controlled amounts of detail to further refine personal strategy
- A Personal Strategic Theme **tells us...**
 - How, specifically, to manufacture achievement by setting goals, measuring progress, and developing targeted action plans
 - The goals that matter most, measures that matter most, and actions that matter most to achieve a single inner soul goal
 - What to 'course correct' if our personal strategy is not working
- A Personal Strategic Theme **enables us...**
 - To view any goal as achievable
 - To convert dreams into reality
 - To achieve mission, realizing vision



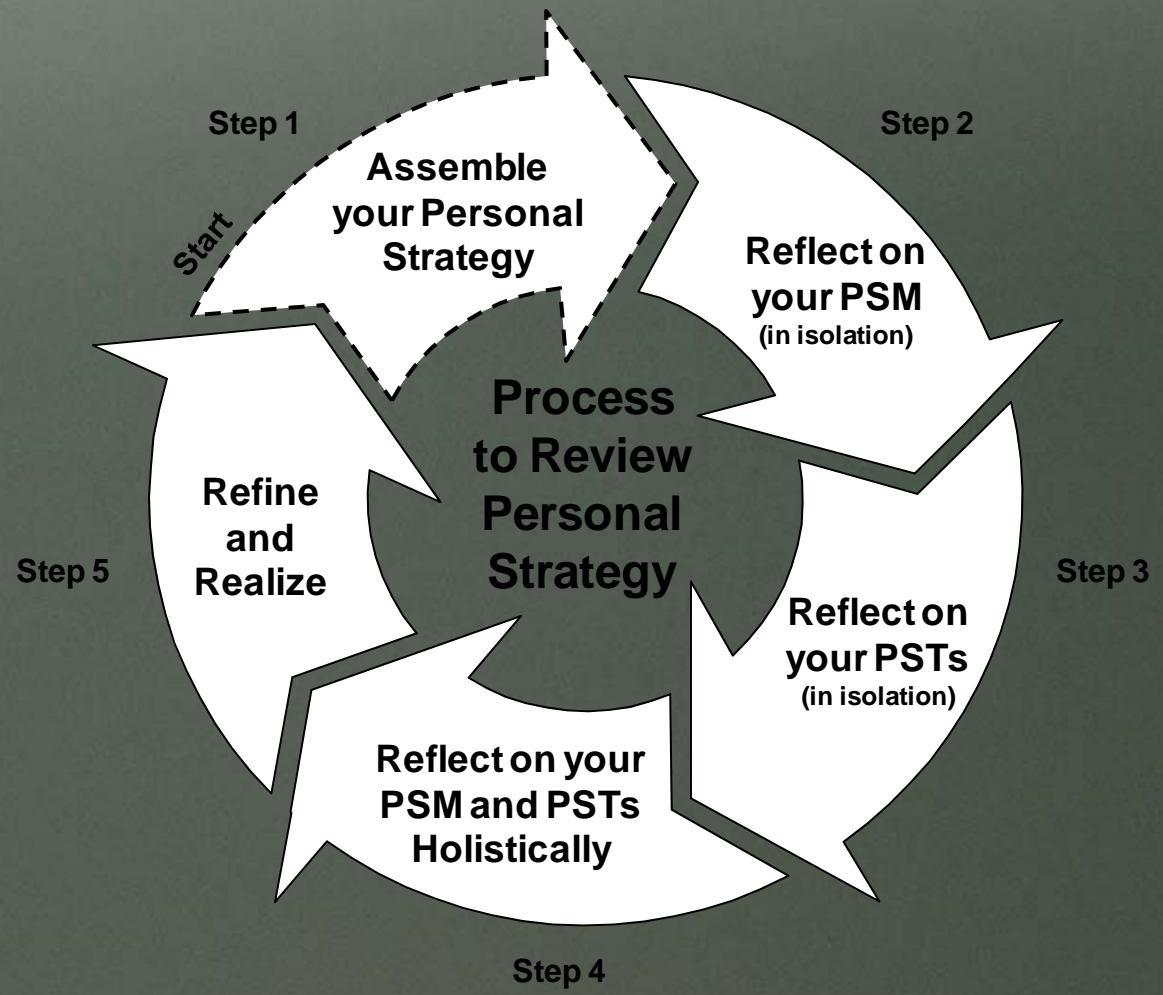
The Process to Build Personal Strategy

Phase V – Reflect, Refine, and Realize Overview - I

- The essence of Phase V is about suspension – meaning to ‘pause’ or ‘delay’
- Why do we ‘pause’? Just as a good carpenter suspends [his cut] to reflect and refine to ensure an effective cut, so, too, do we suspend [implementing personal strategy] to reflect and refine to ensure an effective strategy
- Phase V steps include:
 - Assemble personal strategy
 - Reflect on and refine your PSM
 - Reflect on and refine each PST
 - Reflect on whole personal strategy
 - Refine personal strategy
 - Realize personal strategy
- Phase V outputs include:
 - Personal Strategy Map (final)
 - Personal Strategic Themes (final)
- Phase V enablers include:
 - Solitude
 - Personal Strategy Map (draft)
 - Personal Strategic Theme (draft)



Process to Review Personal Strategy Overview



Reflect, Refine, and Realize

Assemble Your Personal Strategy



- Listed below are the steps to assemble your personal strategy:
 - Print your PSM and PSTs on 11x17 (tabloid) size paper
 - Arrange your personal strategy as a book
 - Your PSM represents the table of contents
 - Your PSTs represent chapters of the book



Reflect, Refine, and Realize

Reflect and Refine Your Personal Strategy Map

- Listed below are the steps to reflect on your Personal Strategy Map:
 - Review your PSM in isolation
 - When reviewing your PSM, consider these questions:
 - Are the inner soul goals on your PSM still what you want in life and from life at this point in your life?
 - Have any inner soul goals become obsolete due to changes occurring within?
 - Have any inner soul goals become obsolete due to changes occurring without?
 - Guidelines:
 - Your PSM should communicate what you want in life and from life at all points throughout life
 - Mark necessary revisions on your PSM



Reflect, Refine, and Realize

Reflect and Refine Your Personal Strategic Themes

- Listed below are the steps to reflect on your Personal Strategic Theme:
 - Review each PST in isolation
 - For each PST, consider these questions:
 - Will stated activities and support goals drive achieving your inner soul goal?
 - Will stated commitments sustain life's work?
 - Do you have between three and five performance measures to monitor your progress?
 - Will your performance measures reliably indicate whether your personal strategy is working?
 - Do your performance measures reflect a higher concentration in the life pathways and commitments components than in other components?
 - Guidelines:
 - Your personal processes and support goals should drive your inner soul goal
 - Your commitments should sustain life's work
 - You should have three to five performance measures to monitor your progress
 - Your performance measures should align more with the life pathways and commitments components than other components on your PST
 - Mark necessary revisions on each PST



Reflect, Refine, and Realize

Reflect and Refine on Whole Personal Strategy

- Listed below are the steps to reflect on whole personal strategy:
 - Tape your PSM on a large wall
 - Tape each of your PSTs beneath the PSM
 - Think about the relations between your PSM and subordinate PSTs
 - View your personal strategy holistically with parts becoming whole
 - Consider these questions when reviewing your PSM and PSTs together as a system:
 - Do your goals complement one another?
 - Are there holes in your personal strategy?
 - Does your personal strategy reflect your mission, vision?
 - Will your personal strategy help you realize mission, vision?
 - Have you defined too many inner soul goals, putting at risk your entire personal strategy?
 - Have you defined too many performance measures, putting at risk your entire personal strategy?
 - Will your personal strategy deliver the type of life you hope to live?
 - Will achieving your personal strategy make you happy?
 - Does your personal strategy inspire you?
 - Guidelines:
 - Your inner soul goals should complement one another; reflect a unified vision for self
 - Your personal strategy should help you achieve mission, realize vision
 - You should have between five and seven inner soul goals and less than 35 total performance measures
 - Mark additional revisions to your PSM and PSTs



Developing Personal Strategic Themes

What it Means to Realize (Implement) Your Personal Strategy

- Upon updating your personal strategy to reflect current thinking, the final step is to realize (implement) personal strategy
- To realize personal strategy, means to do the following:
 - Sequencing action plan initiatives
 - Executing initiatives
 - Collecting scorecard data
 - Recording scorecard data
 - Allocating resources
 - Assessing progress made
 - Reviewing personal strategy
 - Reflecting on personal strategy
 - Refining personal strategy
 - Developing/utilizing 'life aids'



Realizing Personal Strategy - I

Life Aids

Example of 'Life Aid'	How It Can Help You Stay 'In The Zone'
Index Cards	You can use index cards to remind self of what to see, how to think, and how to act. For example, you may use index cards to remind self of: <ul style="list-style-type: none">• Reasons to pursue your inner soul goals• Quotes that inspire soul• Your personal mission and vision in life
Goal Marker	Goal markers are visual reminders of your goal strategically placed throughout your house, car, and office to keep your goal in your face and top-of-mind. For example, if your goal is to lose weight you might have goal markers (e.g. sticky notes) in the bathroom, in the closet, in the kitchen, in your car, and at your workplace reminding you to lose weight.
Songs (custom-made CD/MP3 List)	Songs can inspire and evoke feelings and emotions that put you in the right state of mind to achieve your goals. Create a custom CD/MP3 list with songs that inspire. Play the CD/MP3 list every morning on your way to work. Start your day with a dose of inspiration.
Movies	Movies can inspire and evoke feelings and emotions that put you in the right state of mind to achieve your goals. Watch movies that inspire.
Quotations, Books, Articles	Certain books and/or articles can inspire and evoke feelings and emotions that put you in the right state of mind to achieve your goals. Read books that inspire.
Audio/Video Podcasts	Certain podcasts (e.g. <i>A Strategy Driven Life</i> – www.strategydrivenlife.com) can inspire and evoke feelings and emotions that put you in the right state of mind to achieve your goals. Listen/view podcast episodes that inspire.

Life Aids help us:

- Remember (mission/vision)
- Stay motivated
- Stay enthused
- Establish momentum
- Develop consistency
- Establish habit (to manage life)
- Focus (on attaining the prize)

Realizing Personal Strategy - II

Life Aids



Goals Collage	A goals collage is a collection of images of how you want your life to be. Such images inspire us to achieve our goals; to live as soul would live. For example, if your goal is to earn high wealth and live in a tropical paradise, you might have a picture of a beautiful home on the island of Maui. Similarly, if your goal is to be exceptionally fit, you might have pictures of other people exhibiting extreme fitness.
Morning Routine / Morning Commute	Establish a :30 minute morning routine to review your goals (index cards), listen to songs that inspire (custom CD/MP3 list), and read inspiring quotes. Develop a morning reflective ritual to put oneself 'in the zone'. Further, listen to your favorite inspirational podcasts as you commute in to work.
Evening Routine / Evening Commute	Establish a :30 minute evening routine to review your day. Consider what went well and did not go well for the day then course correct your strategy accordingly. Further, listen to your favorite inspirational podcasts as you commute home from work.
Sunday Routine	Establish a 60 minute weekly routine to review your goals and progress made during the week. Consider what went well and did not go well for the week then course correct your strategy accordingly.
Monthly Routine	Establish a monthly routine to review progress made during the month to achieve your goals. Use your monthly review as an opportunity to redesign your personal strategy to achieve your goals quicker; more aptly.
Annual Routine	Establish a tradition of allocating a few vacation days each year to reflect on your personal strategy for living. Review all aspects of your personal strategy. Review your inner soul goals to ensure that they are still what you want in life and from life. Update all objects of your personal strategy. Update/create new life aids to inspire another year of commitment and high achievement.



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
 - Developed YOUR personal strategy
- Now, before you implement your personal strategy, we discuss in the next episode how to 'Keep Score' of 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