



A Production of
The Personal Strategy Institute

How To Design a Personal Strategy for Living

Part 4 of 5

Randall Scott Rogers
Founder, Personal Strategy Institute



Recap – What We Have Learned in Parts I, II, III

- 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
 - We walked through the process and steps for you to build YOUR personal strategy
 - Now, we learn how to ‘keep score’ of personal strategy



To Measure Yourself – That is the Call!

- Reality is, few people “measure” their life with the intent of improving their life
- Why is this so?
 - We were never taught of the need for, or how to, measure our life
- To measure yourself is important to achieve your personal strategy; to live the life you hope to live
- For, without keeping score we do not know ‘where we are’ to know ‘what to do’ to get ‘where we want to go’
- In this section, you will learn how to *keep score* of your life to ensure you achieve your goals and live a fragrant life



What Does it Mean to Measure the Life Experience?

- Symbolic Meanings
 - One is committed to paying-the-price for success
 - One is serious about achieving one's goals; about actively working in the service of one's goals
 - One understands that what is measured (in life) is what gets done (in life)
 - Taking accountability for one's life

- Tactical Meanings
 - To establish new patterns for one's life
 - To bring about emerging you
 - To continually assess one's life
 - To compete; to establish competitive advantage
 - To establish new rhythm for one's life



When We Talk of Measuring the Life Experience...

“We are talking about measuring our life experience against expectations – of doing what we said we would do”

Why Measure the Life Experience? - I

- Regarding Personal Strategy, Measuring the Life Experience...
 - Provides needed feedback to assess and improve our life
 - Ignites questions; develops a questioning attitude
 - Keeps goals in our face and top of mind
 - Helps us to better understand personal strategy to improve personal strategy
 - Is an antidote to complacency
 - Indicates life progress
 - Makes life performance visible
 - Creates momentum
 - Maintains momentum
 - Drives completion of goals



Why Measure the Life Experience? - II

- Regarding Our Life, Measuring the Life Experience...
 - Helps us learn how to maximize scarce resources (time, energy, money)
 - Serves as a record of accomplishment
 - Develops within us a habit of monitoring life performance
 - Reinforces habit of monitoring life performance
 - Dislodges old to make way for new
 - Develops within us the capability to manage our life
 - Provides a basis for comparison; to establish a reference point of where we are relative to where we want to be
 - Helps drive new behaviors to get new results
 - Enables us to maximize the personal, professional, and financial potential that life offers



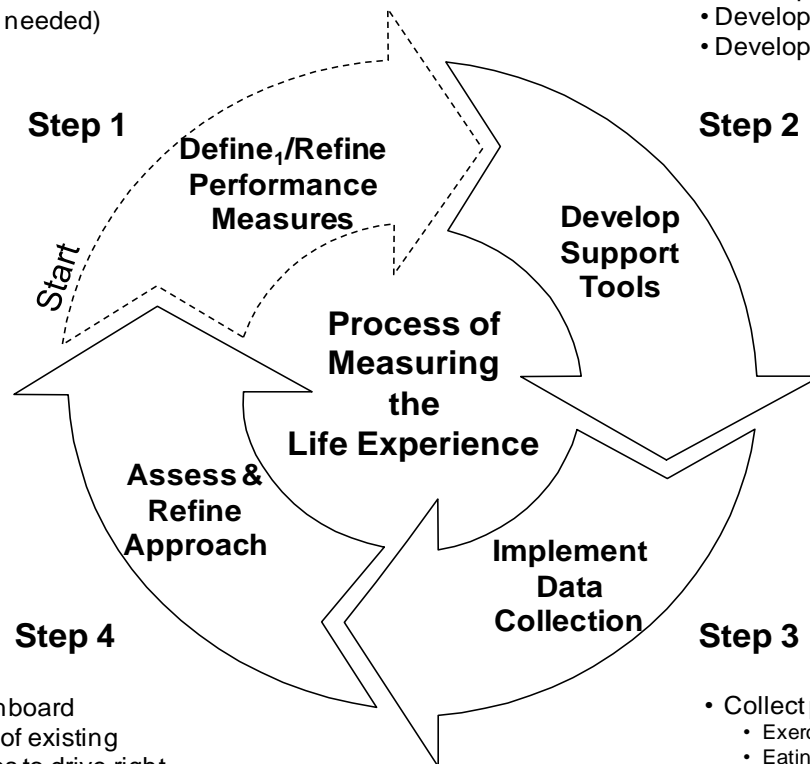
How to Measure the Life Experience?

- Key Questions:
 - How does one manage the 15-35 measures across all PSTs?
 - How does one collect data? What method does one use?
 - How does one assess data collected? What does one look for?
 - How does one report progress with achieving one's inner soul goal and support goals?

The Process of Measuring the Life Experience

- Develop performance measures
- Develop target levels
- Refine measures (as needed)

- Develop Personal Control Plan
- Develop Inner Soul Goal Timeline
- Develop Personal Dashboard
- Develop Raw Data Sheets



- Review personal dashboard
- Assess effectiveness of existing performance measures to drive right behaviors, right results

- Collect performance data
 - Exercise log
 - Eating log
 - Other log
- Record data in raw data sheets
- Update personal dashboard

¹ Occurs when originally developing personal strategy



The Process of Measuring the Life Experience

Step 1 – Define/Refine Performance Measures

- Measuring the life experience begins with defining new (or refining existing) performance measures to drive personal strategy
- You have done this in Part III of this series when you designed your own personal strategy for living
- Once you define aspects of life worth measuring, the next step is to develop support tools to facilitate such measurement



The Process of Measuring the Life Experience

Step 2 – Develop Support Tools

- Step 2 involves developing support tools to enable ‘keeping score’
- There are (4) support tools we use to enable keeping score:
 - Personal Control Plan (PCP)
 - Inner Soul Goal Timeline (ISG Timeline)
 - Personal Dashboard
 - Raw Data Sheets

Step 2 – Develop Support Tools

Personal Control Plan

- A Personal Control Plan is a companion framework to a PST to index all measures contained within a Personal Scorecard
- We need a PCP because, although a PST communicates *what to measure*, it does not offer guidance on how to measure

PERSONAL CONTROL PLAN

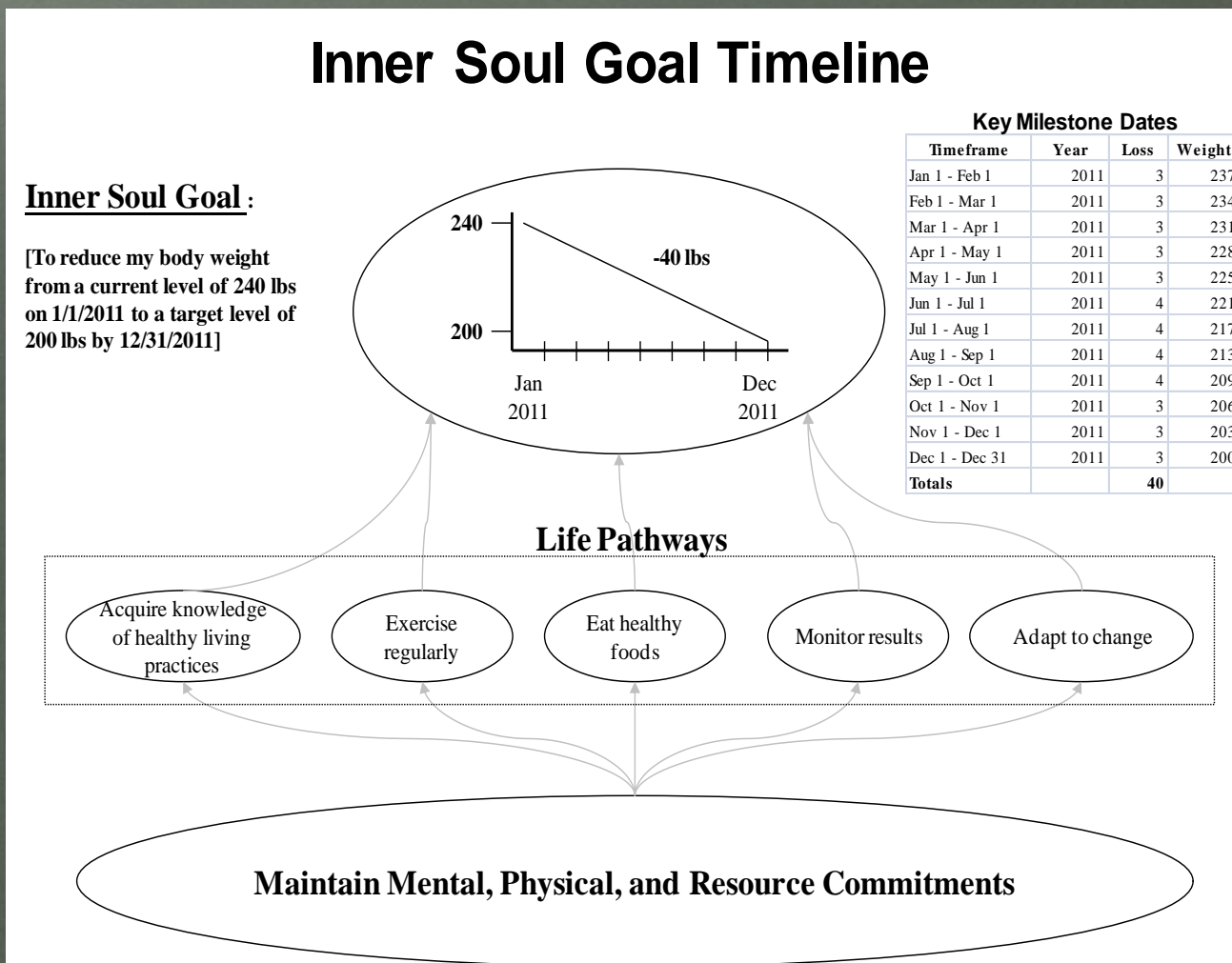
Theme: [Be Exceptionally Fit]

Measure	Lead or Lag	Target Value	What Measured	How Measured	Why Measured	Where Data is Recorded	Data Collection	Decision Rule / Corrective Action
Body Weight	Lag	200 lbs	Total body weight	Digital scale	Primary outcome measure	Weight Log (Excel worksheet)	Weekly	If [body weight] increases from week to week, assess eating log to determine what foods are responsible for the weight gain and make necessary adjustments; examine workout routine for modification
# Workouts	Lead	4	Total number of times exercised in a week	Count from exercise log	Drives inner soul goal	Exercise Log (Excel worksheet)	Weekly	If [# of workouts] is < 4/week, assess why time cannot be allocated to workouts consistently and make necessary adjustments
# Carbohydrates consumed	Lead	< 90	Number of carbs associated with food and drink consumed per day	Reference carb booklet	Drives inner soul goal	Eating Log (Excel worksheet)	Daily	If [# of carbohydrates consumed] is > 90/day, assess why I was not able to limit/restrict food eaten to maintain daily carb goal; make necessary adjustments to ensure meeting carb intake goal
# Calories burned through exercise	Lead	3,000	Amount of calories burned through exercise in a week	Count from exercise machines/estimate	Drives inner soul goal	Exercise Log (Excel worksheet)	Weekly	If [# of calories burned through exercise] is < 3,000/week, assess workout routine and make necessary adjustments to ensure meeting minimum calorie expenditure goal
# Hours acquiring knowledge of healthy living practices	Lead	2	Amount of time allocated to learn healthy living practices in a week	Watch/Clock	Drives inner soul goal	Training Log (Excel worksheet)	Weekly	If [# of hours spent learning healthy living practices] is < 2 hrs/ week, review daily planner to understand why I was not able to allocate time; make necessary adjustments to ensure minimum time commitment is met
# Hours allocated to aerobic/strength training exercise	Lead	5	Amount of time allocated to exercise in a week	Watch/Clock	Drives inner soul goal	Exercise Log (Excel worksheet)	Weekly	If [# of hours allocated to exercise] is < 5 hrs/week, assess why workouts are being cut short and make necessary adjustments

Step 2 – Develop Support Tools

Inner Soul Goal Timeline

- Tracking progress (of a goal) is only meaningful within the context of an established timeline
- To communicate timelines, we use the ISG Timeline framework





Step 2 – Develop Support Tools

Inner Soul Goal Timeline (Restating your Inner Soul Goals)

- You need to restate your inner soul goals in more precise terms
- Steps to restate your goals:
 1. Restate your inner soul goal using the framework below
 - *[To reduce/improve <primary inner soul goal measure> from <current level> to <target level> by <timeframe>]*
 - Example: Original ISG: 'Be exceptionally Fit'
New ISG: "To reduce my body weight from a current level of 240 lbs on 1/1/2011 to a target level of 200 lbs by 12/31/11"
 2. Specify key milestone dates with intermediate target values/goals to establish a comparative against which evaluate progress
 3. Document the cause and effect relations from commitments, to life pathways, to your inner soul goal (optional)



Step 2 – Develop Support Tools

Personal Dashboard – I

- We use Personal Dashboards to communicate the status, health, and progress of our personal strategy
- Specifically, we use Personal Dashboards to:
 - Communicate progress with achieving our goals
 - Keep goals in our face and top of mind
 - Inspire us to continue to pay the price
 - Establish a visible connection with our goals
 - Bring goals to life
 - Establish momentum
 - Maintain momentum

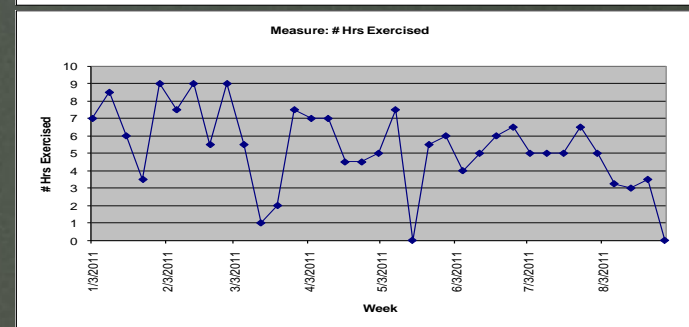
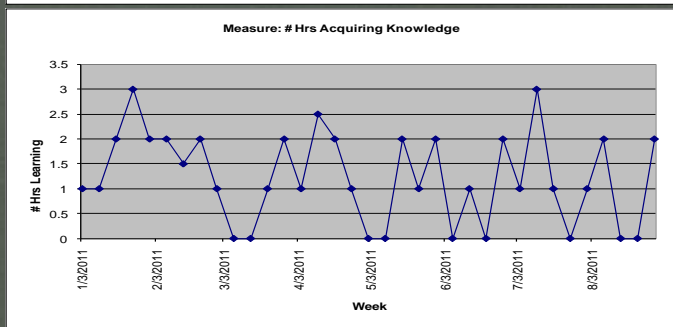
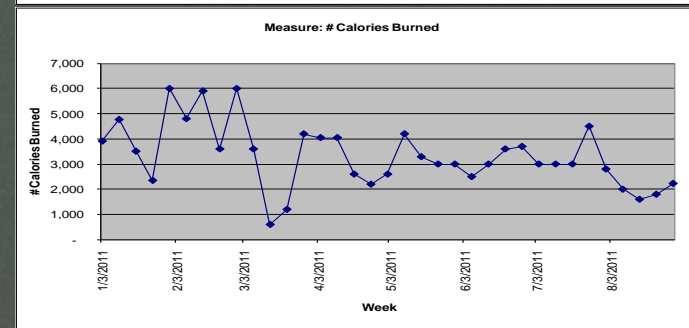
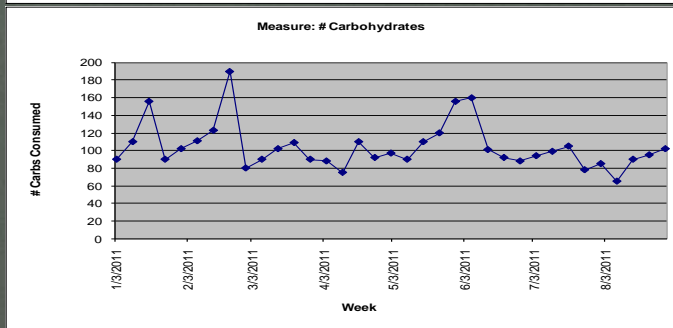
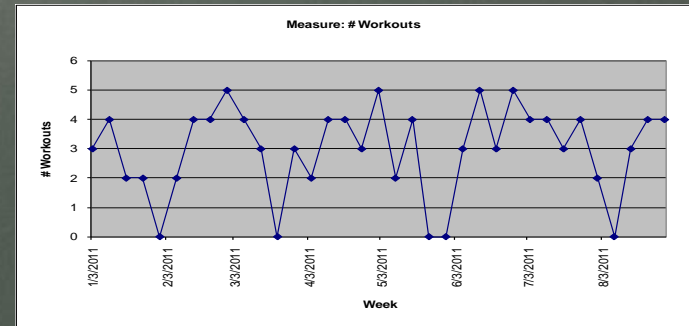
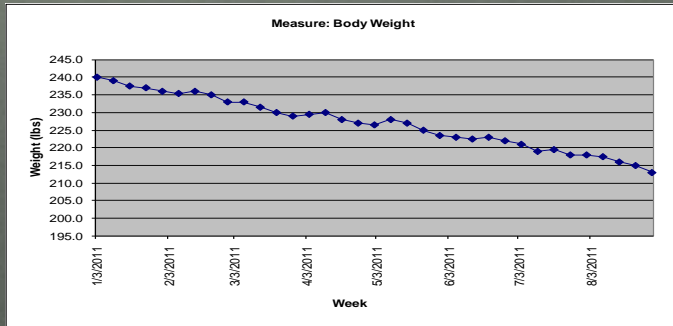
Step 2 – Develop Support Tools

Personal Dashboard – II



PERSONAL DASHBOARD

Theme: [Be Exceptionally Fit]

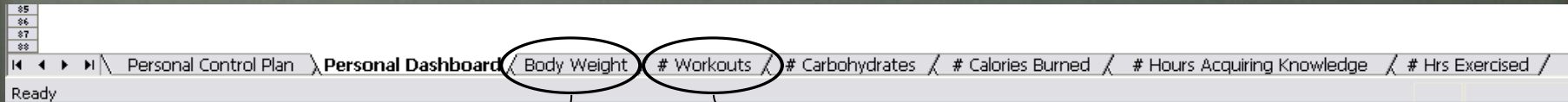


Step 2 – Develop Support Tools

Personal Dashboard – III



MS Excel Workbook



MS Excel Worksheet

RAW DATA SHEET

Measure: Body Weight / lbs
 Target Value: 200 lbs
 Target Date: Dec, 31st, 2011

Weight Date (Monday)	Weight	Amount Lost (from base)	Notes
1/3/2011	240.0	BASE	
1/10/2011	239.0	-1.0	
1/17/2011	237.5	-2.5	
1/24/2011	237.0	-3.0	
1/31/2011	236.0	-4.0	
2/7/2011	235.4	-4.6	
2/14/2011	236.0	-4.0	
2/21/2011	235.0	-5.0	
2/28/2011	233.0	-7.0	
3/7/2011	233.0	-7.0	
3/14/2011	231.5	-8.5	
3/21/2011	230.0	-10.0	
3/28/2011	229.0	-11.0	
4/4/2011	229.5	-10.5	
4/11/2011	230.0	-10.0	
4/18/2011	228.0	-12.0	
4/25/2011	227.0	-13.0	
5/2/2011	226.5	-13.5	
5/9/2011	228.0	-12.0	
5/16/2011	227.0	-13.0	
5/23/2011	225.0	-15.0	
5/30/2011	223.5	-16.5	
6/6/2011	223.0	-17.0	
6/13/2011	222.5	-17.5	
6/20/2011	223.0	-17.0	

RAW DATA SHEET

Measure: # Workouts / week
 Target Value: 4

Week Of	# Workouts	Notes
1/3/2011	3	
1/10/2011	4	
1/17/2011	2	
1/24/2011	2	
1/31/2011	0	
2/7/2011	2	
2/14/2011	4	
2/21/2011	4	
2/28/2011	5	
3/7/2011	4	
3/14/2011	3	
3/21/2011	0	
3/28/2011	3	
4/4/2011	2	
4/11/2011	4	
4/18/2011	4	
4/25/2011	3	
5/2/2011	5	
5/9/2011	2	
5/16/2011	4	
5/23/2011	0	
5/30/2011	0	
6/6/2011	3	
6/13/2011	5	
6/20/2011	3	



The Process of Measuring the Life Experience

Step 3 – Implement Data Collection

- How do I begin collecting data?
 - The answer lies within your Personal Control Plan
 - All elements of collecting personal performance data lies within the PCP
- Therefore,
 - Begin collecting life data today
 - Record data in your raw data sheets
 - Update your personal dashboard
- Finally, upon implementing data collection, the final step in measuring the life experience is to assess and refine your approach

The Process of Measuring the Life Experience – V

Step 4 – Assess and Refine Approach



- In Step 4, we want to assess our current performance measures to ensure they drive right behaviors, right results
- The insights we gain from assessing our measures and measurement system inform us in how to improve our approach
- Ultimately, what we measure on the surface of life has to be meaningful; that is, such measures should help us achieve our inner soul goals
- The goal when assessing both your performance measures and life performance is to improve the effectiveness of your personal strategy
- **Note:** For greater insight on how to improve the effectiveness of personal strategy, please refer to the video training tutorial offered by the Personal Strategy Institute on 'How to Manage Personal Strategy'

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
 - Discussed how to keep score of your personal strategy
- At this point there remains but one thing for you to do: **Implement your personal strategy – today – NOW!**
- In the final episode of this video training tutorial we discuss what it means to live 'A Strategy Driven Life'



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