

STRATEGIC PLANNING FOR YOURSELF

a toolkit for building your best life

We often think of strategic planning as a process for organizations and businesses to help clarify organizational mission and goals.

The strategic planning process also has value to us as individuals. By defining our personal values, mission, and vision, setting clear goals, and prioritizing actions, we can stay focused on what truly matters to us.

Ideally, a strategic plan for any person or organization provides guideposts for us to follow as we move forward. By delineating what matters, we also define where we will and will not compromise, where we put our energy, we become accountable to ourselves, and manage resources more effectively.

A strategic plan is a comprehensive framework that aligns mission, vision, and values with actionable strategies to address current challenges and seize future opportunities.

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Like most organizational strategic plans, personal plans contain five key elements

- **Values**
- **Mission**
- **Vision**
- **Goals**
- **Action**

As you move through each section, don't be afraid to refer back to and edit previous sections. As you write your mission statement, you may find that your values become clearer. A strategic plan is a living document. Our goals and obstacles are now different from what they will be in five years or even five days. Never hesitate to change your plan to meet you where you are.

Values

On the next page, you will find a list of values.

This is not a comprehensive list, if there is something you consider fundamental that needs to be added to the list, feel free to add it. These are your values, and you get to define them.

Read through the list and consider it. Put a mark by up to 20 values that most resonate with you.

*“When your values are clear to you,
making decisions becomes easier.”*

Roy E. Disney

CORE VALUES LIST

Acceptance	Freedom	Peace
Achievement	Friendship	Persistence
Adventure	Fun	Pleasure
Assertiveness	Generosity	Power
Authenticity	Gratitude	Protection
Balance	Growth	Quiet
Beauty	Hard Work	Relationships
Belonging	Harmony	Respect
Challenge	Hope	Responsibility
Comfort	Honesty	Safety
Commitment	Health	Self-Acceptance
Community	Humor	Self-Control
Compassion	Independence	Sensuality
Contribution	Integrity	Service
Courage	Intelligence	Sexuality
Creativity	Intimacy	Solitude
Cultural Heritage	Justice	Spirituality
Curiosity	Kindness	Stability
Discipline	Knowledge	Strength
Engagement	Learning	Tolerance
Environmentalism	Love	Trust
Excitement	Making a Difference	Truth
Fairness	Mastery	Virtue
Fame	Mindfulness	Wealth
Family	Openness	Wisdom
Fitness	Order	
Flexibility	Passion	OTHER
Forgiveness	Patience	

Group similar values together in a way that makes sense to you. Make up to five groupings. If you end up with more than five, drop the grouping that is least important to you.

For instance:

Comfort	Openness	Health	Stability	Passion
Peace	Flexibility	Fitness	Community	Intimacy
Solitude	Generosity	Strength	Cultural Heritage	Love
Quiet	Forgiveness		Relationships	
Balance			Safety	

Identify the one word that you feel best represents the group. These are your values.

Comfort	Openness	Health	Stability	Passion
Peace	Flexibility	Fitness	Community	Intimacy
Solitude	Generosity	Strength	Cultural Heritage	Love
Quiet	Forgiveness		Relationships	
Balance			Safety	

Write your groupings below:

Sample Core Values

Honesty, kindness, safety, and public service.

Environmentalism, family, flexibility, and wisdom.

Peace, self-acceptance, and education.

Cultural heritage, responsibility, and integrity.

Tolerance, balance, health, humor, and community.

Write your core values here:

Mission Statement

Mission statements briefly answer three questions: who, what, and why?

- Who are you?
- What do you do?
- Why do you do what you do?

Your statement should be brief and easy to understand. It should not be longer than two sentences. A good starting template for a mission statement is:

“To [goal or achievement] by [what you do] to [impact you want to make], guided by [values].”

To compose a mission statement that resonates, you will need to take time to honestly reflect on what you do, why you do it, and who you are. Identifying your core values is the foundation of this, telling us what matters most.

As honestly as possible, define your purpose:

- Clarify Your Goals: Consider what you want to achieve in different areas of your life—career, relationships, personal growth, etc.

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- Think About Your Impact: Reflect on how you want to contribute to the world and what legacy you wish to leave.
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This is an excellent time to perform a SWOC analysis. You may have more commonly heard of this as a SWOT analysis, but rather than “threats” we want you to think about challenges. Threats are things to be countered, challenges are things to be overcome. You can find a SWOC analysis sheet at the back of this packet.

Now that you have considered what you do and why you do it, consider how you can boil that down to a mission statement. Your values inform this by codifying what is most important to your core. For instance, if you are a Communications Director and your values include “honesty” and respect,” you could begin by thinking of ways to build community via your work.

Starting with our earlier template: **“to [goal or achievement] by [what you do] to [impact you want to make], guided by [values]”** it may look something like this:

To strengthen the communities in our city by conveying accurate and engaging information to improve understanding, guided by honesty and respect.

Think about what you do and the impact you hope you are making. Your mission statement can be simpler or slightly longer, use this as a guide, not a rule. Try to keep your mission statement two sentences long or shorter.

Begin to compose your mission statement below:

SAMPLE MISSION STATEMENTS

To educate and inform my community using my talents as a communicator, reducing disinformation and confusion.

To create space for people in my family, community, and constituency to be heard and feel understood.

To be a storyteller who makes the world a less confusing place.

To tell the truth in a way that, as much as possible, does not hurt people.

To leave the world a better place.

Vision Statement

Vision statements succinctly lay out personal and/or professional goals. They provide a compass to help determine what path we choose to follow.

A vision statement helps us answer the questions, “where am I going?” and “how will I get there?”

Think of a map of your life, your vision is your destination. You may not go there directly, you might change your mind and go somewhere else, but this is where you are headed right now. Your values and your mission will help you determine how you

get there. You may need to follow a more complicated path to stay true to your values, or you may find that your mission helps speed you along the way.

Your vision should be as concise as your mission statement and core values list. You should be able to write all three on a card that you can slip in your wallet or a pocket.

Write your vision statement following the same basic format as your mission statement, but change your starting template to face the future.

“To [achieve] by [doing what], creating [desired future outcome] for guided by [core values/principles]”

Read over your values and your mission.

Close your eyes and picture five years from today. This is an ideal vision. This is exactly the life you want. Answer these questions for yourself.

- Where are you?
- What are you doing?
- Who are you with?
- How do you feel?
- Why do you want this?

Once you have your answers, refer back to your values. Which of these does your vision most align with?

Using the above template as a starting point, write your vision statement.

Sample Vision Statements

To be retired, living with my sister, and teaching knitting in my community. I want to strengthen my community and pass on my knowledge.

To become City Manager. I love the challenge and importance of public administration and want to make my city the best place to live.

I will own an apiary with my husband. We have kept bees for years and I find time spent near the hives rewarding in a way my current job is not.

To be traveling the country in a van with my dogs. I value adventure and new experiences.

I will have the same position, but find more ways to balance and nurture my personal life. Family and friends are a core value of mine. Too many important moments have been overshadowed by my work.

Setting Goals and Taking Action

Now that you have your values, mission, and vision to guide you, you will set your goals and make an action plan.

Make sure your goals are SMART goals:

- **Specific:** Clearly define what you want to achieve.
- **Measurable:** Include criteria to measure your progress and determine when you have achieved the goal.
- **Achievable:** Ensure the goal is realistic and attainable given your current situation.
- **Relevant:** Align the goal with your overall vision.
- **Time-Bound:** Set a deadline or timeframe for achieving the goal.

Your goals should align with your vision and/or mission but do not have to conform exactly. If your vision is to live more in balance with your personal and professional

lives, making time for friends fits into that plan, even if your vision does not explicitly mention friendships.

To truly make your personal strategic plan work for you, it must be something you can implement. This means, while it is tempting to set vague goals like “socialize more,” keep SMART in mind.

So, rather than “socialize more” we might say “see two friends a month.” Is this SMART? Yes.

- Specific: two friends.
- Measurable: two times a month
- Achievable: you are setting a realistic goal and not trying to go out with friends every night.
- Relevant: balancing your personal and professional lives
- Time-Bound: to-do every month

Now that you have a SMART goal, you can add the action required to achieve it.

GOAL: See friends twice a month

Action Plan:

- *Reach out to (names of friends) by X date.*
- *Find times that work to get together.*
- *Schedule time(s)*

Timeline: to be completed every month.

By thoughtfully defining your values, vision, and mission, setting S.M.A.R.T. goals, and creating actionable steps, you empower yourself to move forward confidently and set boundaries. Regularly review and adjust your plan as your goals, life, and circumstances evolve. Remain flexible and curious, and keep talking with your communities and seeking feedback. With commitment to a well-structured strategy, you can navigate challenges effectively and find balance. Your plan is not just a document but a dynamic tool that empowers you to move forward.

The following pages contain additional tools that may be helpful as you develop, finalize, or revisit your plan.

SWOC ANALYSIS

A tool to define where you excel and where you can improve

Below you will find a grid and some starter questions to perform a personal SWOC analysis. You may be more familiar with the acronym SWOT, but we are swapping threats for the more approachable challenges. So consider your strengths, weaknesses, opportunities, and challenges

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none">• What are my talents?• What do I have that others don't?• What would others say are my strengths?• What are my connections and resources?	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none">• What are my negative habits or traits?• What do I want to improve in my life?• What do I avoid because I lack confidence?• How do I react when I am in error?
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none">• What's the current state of my personal life and career?• What tools can help me achieve my goals?• How could my network help me?• What can I do to improve my quality of life?	<p style="text-align: center;">Challenges</p> <ul style="list-style-type: none">• Am I, or my industry, changing direction?• How do I balance personal and professional goals?• Do any of my weaknesses threaten my success?• What's the current state of my relationships?

A personal SWOC analysis requires brutal honesty with yourself. Some people have difficulty thinking of themselves in terms of strength, others struggle to imagine their weaknesses. This is an excellent time to ask people you trust to help you assess your SWOC categories.

Listen to them with an open mind and be ready to hear criticism and things you have not heard before. Everything others say does not have to be included, but take it all in the spirit we hope your trusted community gives it, with kindness and a desire to help.

You may use this blank SWOC grid to begin or guide your analysis. Use this as you see fit, for questions, answers or even brainstorming. Make multiple copies if they are helpful to you.

<p style="text-align: center;">Strengths</p>	<p style="text-align: center;">Weaknesses</p>
<p style="text-align: center;">Opportunities</p>	<p style="text-align: center;">Challenges</p>

Life Roles

A tool to focus on who you are and what's important

We all have a variety of roles. Often we fill more than one role in an area of our life.

For example, in your family, you may be a spouse, a parent, and a caregiver for an aging relative.

At work, you may be a boss, an employee, and a mentor.

When we look at our various roles and consider them, we think about who we are with our families, friends, workplaces, and the wider community. This context is useful when looking at our values, missions, and visions. When thinking about these key components of your plan, think about them within the frame of your roles.

Think about the parts of your life. What roles do you fill? where you spend time.

What are your roles at home?

What are your roles at work?

What are your roles in your wider community?

Are there other roles you have?

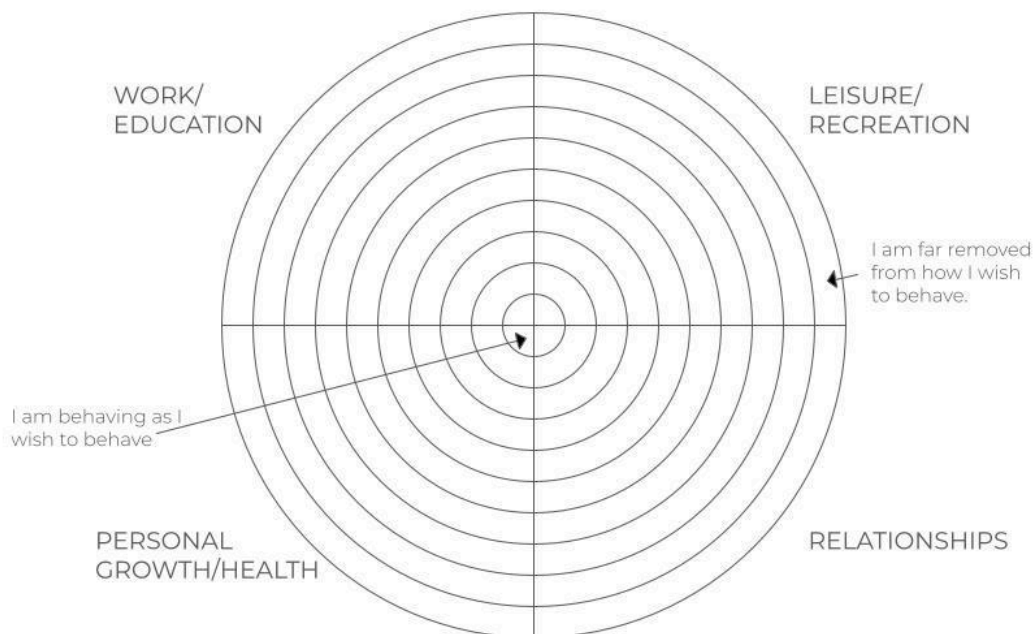
The Bullseye

A tool for assessment and prioritization

(based on Tobias Lungren's "Bulls Eye" exercise)

Consider your life at this moment. Think about the following categories: how do you want to behave? How do you want to treat others, the world, and yourself? What kind of person do you want to be?

When you consider these sections, consider where you sit currently with the people, tasks, activities, and skills within them. You can be as granular or broad as you wish. Place an X within the ring that most closely resonates to where you feel you are today. You may choose to place multiple Xs in some areas to represent different parts of your life. An example can be found on the next page.



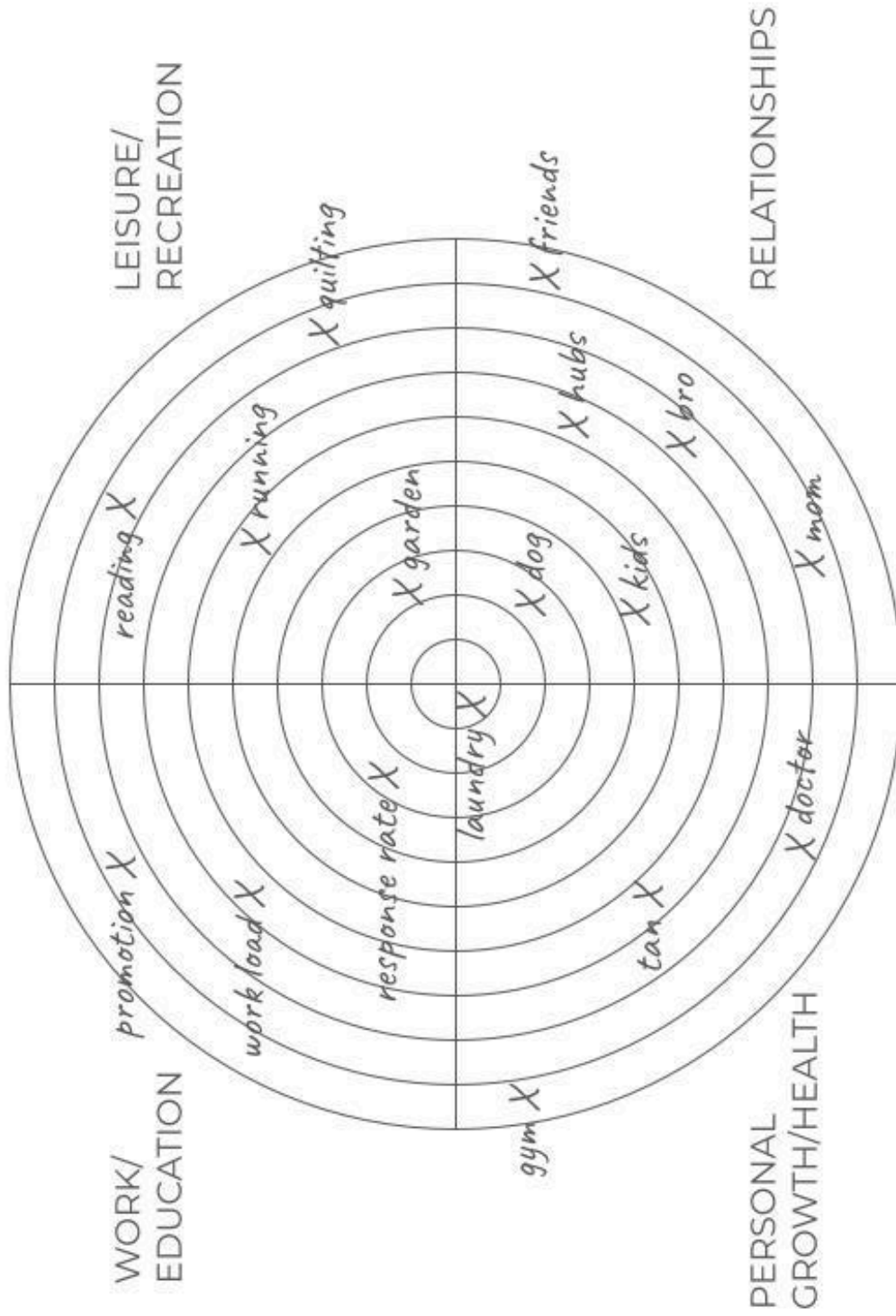
Work/Education includes workplace, skill development, career, education, etc.

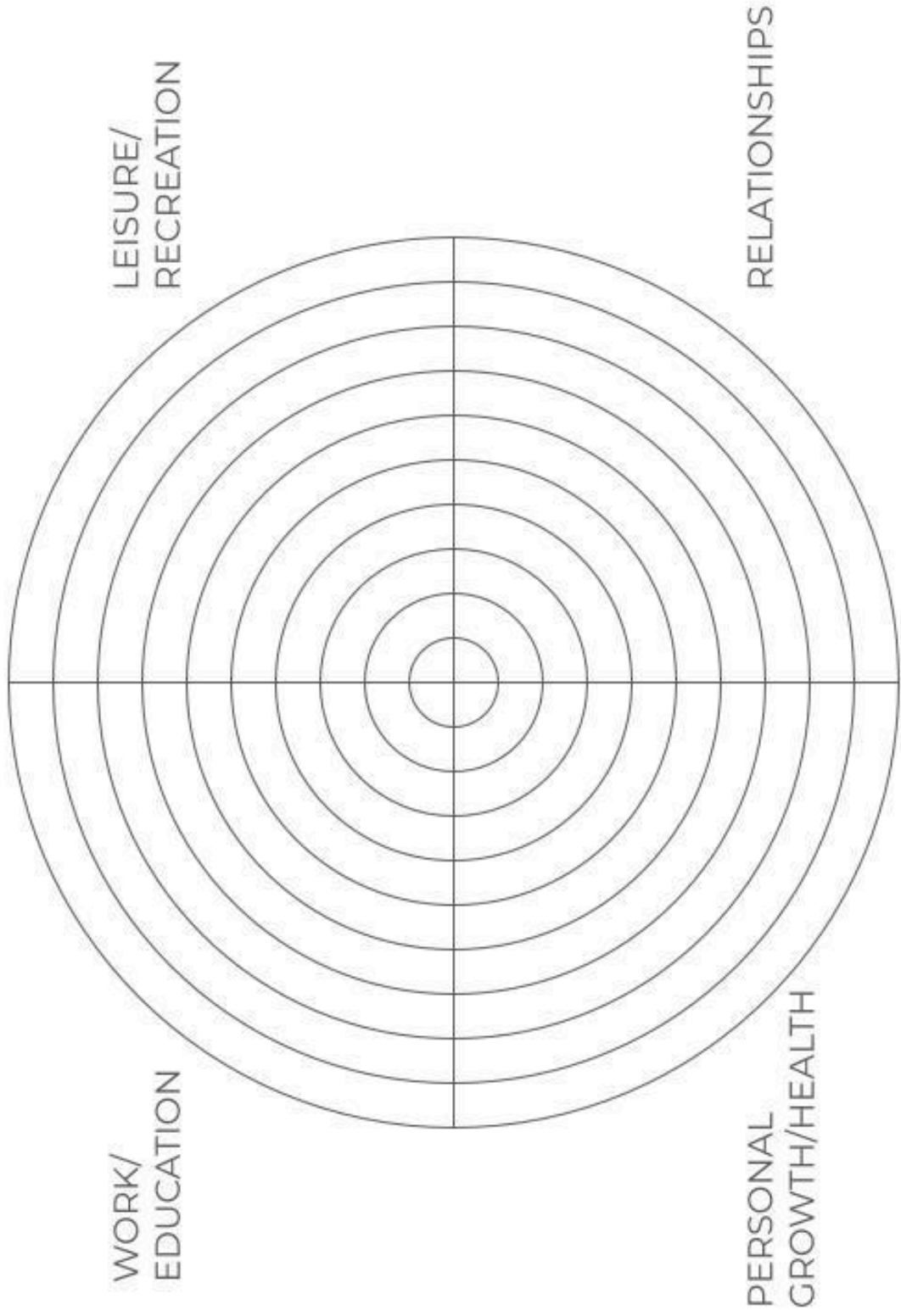
Relationships include your partner, children, parents, relatives, friends, colleagues, and your community.

Personal Growth/Health includes spiritual, religious, or other practices as well as mindfulness and exercise, caring for your lived environment, life skills, and health.

Leisure/Recreation includes how you enjoy your time, hobbies, activities, relaxation, and activities you find enjoyable, stimulating, creative, or fun.

Sample Bullseye Exercise:





The Values Square

A tool for accountability and tracking progress

A worksheet from The Happiness Trap (2nd edition) by Russ Harris

'Work' is an umbrella term for paid work, volunteer work, or domestic/caregiver work. It also includes training and education, both formal (like a course or apprenticeship) or informal (e.g. from reading books or watching documentaries or having a friend teach you how to do something).

'Love' is a catch-all phrase for relationships with people you consider important in your life. This may include your partner, parents, friends or relatives, or even work colleagues.

'Play' encapsulates everything you do for rest and recreation: your sports, hobbies, or creative outlets; the things you do for fun, relaxation, or to explore the world around you.

'Health' refers to everything you do to look after your physical wellbeing, psychological wellbeing, and (if relevant) your spiritual/religious wellbeing. This may include exercising, healthy eating, getting into nature, reading self-help books or seeing a therapist, practicing your unhooking skills, mindfulness, self-compassion, prayer, meditation, yoga, community work, and so on.

All four domains overlap, and you can subdivide squares if you wish. For example, some people split the 'Love' box into friends/partner/children, or the 'Health' box into physical/psychological.

The square on the next page reviews last week; the square on the page after is for the week ahead.

REVIEWING THE PAST WEEK

<p>WORK Values I want to start or keep putting into play:</p> <p>How I've lived by these values, on average, over the last week: 0 = not at all; 10 = very well My score:</p>	<p>LOVE Values I want to start or keep putting into play:</p> <p>How I've lived by these values, on average, over the last week: 0 = not at all; 10 = very well My score:</p>
<p>HEALTH Values I want to start or keep putting into play:</p> <p>How I've lived by these values, on average, over the last week: 0 = not at all; 10 = very well My score:</p>	<p>PLAY Values I want to start or keep putting into play:</p> <p>How I've lived by these values, on average, over the last week: 0 = not at all; 10 = very well My score:</p>

LOOKING TO THE WEEK AHEAD

<p>WORK Values I want to start or keep putting into play:</p> <p>Things I could say or do in the week ahead, to put those values into play:</p> <p>At the end of the week, complete this review: I lived by the values above, on average: 0 = not at all; 10 = very well. My score:</p>	<p>LOVE Values I want to start or keep putting into play:</p> <p>Things I could say or do in the week ahead, to put those values into play:</p> <p>At the end of the week, complete this review: I lived by the values above, on average: 0 = not at all; 10 = very well. My score:</p>
<p>HEALTH Values I want to start or keep putting into play:</p> <p>Things I could say or do in the week ahead, to put those values into play:</p> <p>At the end of the week, complete this review: I lived by the values above, on average: 0 = not at all; 10 = very well. My score:</p>	<p>PLAY Values I want to start or keep putting into play:</p> <p>Things I could say or do in the week ahead, to put those values into play:</p> <p>At the end of the week, complete this review: I lived by the values above, on average: 0 = not at all; 10 = very well. My score:</p>