

STRATEGICALLY YOU

Applying strategic planning practices
to live the life you desire

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MEET THE
AUTHOR



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Shane is president of one of the nation's largest private companies, author of ***Fostering Culture: A Leader's Guide to Purposefully Shaping Culture***, and a dynamic and talented speaker on the topics of leadership, purpose and workplace culture.

PERSONAL PLANNING

If you lead a team or work in a business, you are probably familiar with some basic principles of strategic planning. Most organizations have structure around answering:

What are we trying to achieve (our definition of success)?

How are we going to do it (our strategy)?

The result of these discussions are objectives, investments and budgets — in other words, decisions around how to focus our organizational time and energy. Yet, most of us do very little planning when it comes to our own lives.

Assuming we have thought about what kind of life we want to lead (our definition of success), our efforts at developing a personal strategy show up at best as assorted New Year's resolutions that are discarded and forgotten by March.

In this eBook, I'll walk you through ideas I have for how to practically apply some of the lessons we have learned from organizational planning to your own life, and how to set yourself up for success by creating personal accountability to your goals.

If you're starting this work for the first time, you might want to take a minute to read an article I wrote previously about my approach to [**how I think about purpose for my life**](#).

STRATEGY AND EXECUTION

There are a few basic elements to creating and executing any plan.

1

DEFINING WHAT IT MEANS TO WIN

Unlike sports where it is clear who wins the game, success in life and business is totally subjective. We must create clarity on what success is for us and regularly assess if the definition still holds true.

2

DETERMINING HOW TO WIN

In baseball, you hear managers talk about how their team can win – “we win with pitching and defense” or “we will hit the long ball.” We must figure out how to spend our limited time and energy in a way that will enable us to win. This is called strategy.

3

TRACKING OUR PROGRESS

A baseball manager may say he is going to win with pitching, but if he doesn't look at his team's Earned Run Average, he won't know if they are actually any good at pitching. How do we know if we are executing our winning strategy? What are the things we need to track to see if we are doing what we said we would do?

4

LEARNING AND ADJUSTING

As Mike Tyson said, “everyone has a plan until I punch them in the face.” We thought our strategy would work, but is it? What do we need to adjust and do differently?

These principles apply to any business, nonprofit or team. Can they also apply to me?

TIME TO FOCUS

Most teams have an event to focus on strategic planning. They may take everyone offsite to a venue or hotel or just schedule a special meeting, but they recognize that they need devoted, distraction-free time to focus on the important process of planning.

Checking yourself into an offsite venue is optional, but if you are going to seriously consider big questions for your life, it is worth giving yourself enough time and a space where you can focus.

Modeled somewhat after our business planning sessions, a few years ago I started doing an annual personal retreat.

YOUR RETREAT

1

SCHEDULE TIME WITH YOURSELF

I use the relative quiet of New Year's Day when everyone else is sleeping, watching football and not expecting me to respond to email, but any day of the year works. Let others know you'll need a little personal, focused time. Be sure to eliminate as many distractions as you can, including your phone. But don't feel like you need a lot of time for this. You'll be surprised at how much you can think about with two hours of uninterrupted time.

2

BRING THE TOOLS YOU NEED

When we do planning, we talk about inputs and outputs. What information do we need (inputs) to decide what we are going to do (outputs)? Figure out what inputs will be helpful to you - your calendar, your journal and your exercise tracking app if you use them. If your goals are financial, you might want to bring bank statements. If they're health-related, you might want to have that data handy. Think about what's important to you, and bring along the tools you will need to help you set goals.

AT YOUR PERSONAL RETREAT

DO A REALITY CHECK

Mine the evidence of the past year to consider how you have prioritized your time.

What did I do this year? Literally, how did I spend my time?

Consider the things you did that helped you make progress towards what's important to you and those that may have taken you backward.

Did you make the choices of how to spend your time that you wish you had?

How does reality compare to the goals you have set for yourself?

Make sure to consider all areas of your life.

How healthy are my key relationships?

Do I feel like I am contributing value through my work or service?

Am I taking care of myself physically, emotionally and spiritually?

Use whatever you can to prompt introspection. The goal is to be honest with yourself about the activities you chose and the decisions you made that were consistent with who you want to be and the ones that weren't.



AT YOUR PERSONAL RETREAT

REASSESS YOUR DESIRES

Affirm or adjust your goals and what you consider to be your life's mission or purpose.

Are the goals you have stated for yourself or what you have been working towards still what you wish to achieve?

Have circumstances changed, altering what you want to experience in life?

Restate what a successful life is for you.



AT YOUR PERSONAL RETREAT

LOOK AHEAD

Think about the next year as an opportunity to align how you spend your time more closely with what's most important to you long term.



What are the things you want to do in the new year to achieve the desires you have for your life?

It may involve a big change, like moving or getting married or finding a new job. More likely, however, it will be small things - little habits and routine changes that over time add up to something big. Almost certainly, it will involve not just the new things you will do but also things you will stop doing.

Which of those activities that are detracting from your life are you going to stop, and what will you do with that newfound time and energy?

SET YOURSELF UP FOR

PERSONAL ACCOUNTABILITY

In most companies, plans are created once a year and then collect dust on a shelf for 11 months before being looked at again. These exercises only mean something if we create accountability to live by them and measure our progress. This is hard to do, as no one likes accountability. However, without creating visibility into your process, chances are you won't accomplish much of your plan as the whirlwind of daily life takes over.

A while back, I led a group through a life-planning exercise, and three years later, I checked in with them. Most had not followed through on their plan, so I asked a few questions to understand more. Here's the essence of what they told me: "The exercise was powerful, but I didn't make it part of my life. It felt too big and overwhelming." One person was the exception, though. The difference for him was that he focuses on small, practical goals and continually checks in with himself about how he's doing. Setting goals that require unsustainable activities are bound to fail. But like compound interest, small changes over time become big changes. **Break it down to your life and your reality now.**

What are the small changes that can become bigger changes over time?

STEPS TOWARDS ACCOUNTABILITY

1

START SMALL

A journey of a thousand miles begins with a single step. Don't get overwhelmed by huge changes. Figure out some small adjustments you can make and keep making. If you need to lose 50 pounds, don't vow to run a marathon. Instead, start taking the stairs instead of the elevator. If you have an important relationship that needs to be nurtured, commit to being present with that person one time every day.

2

OUT OF SIGHT MEANS OUT OF MIND

Keeping your goals front and center in your daily life with little reminders is a good way to prevent them from going the way of New Year's resolutions, which are notoriously fleeting. Set a reminder on your phone or calendar, find a symbol for your accountability and keep it within view, or tell someone you love and trust what your goal is and give them permission to ask you about your progress, or invite them to participate with you.

3

USE A JOURNAL

If you're the journaling type, or think that you might be, this can be the perfect way to chronicle your time, as well as the life moments in which your mission has come into play.

Your journal can be a valuable tool as you consider and make decisions. If you aren't the pencil-and-paper type, there are plenty of technology tools to help you simply record what is going on in the areas of your life that you want to track

4

CHECK IN WITH YOURSELF

Believe it or not, 1-2 minutes a day might be all you need to track whether you are putting your goals into practice and following through on what you've set out to do.

However you check-in on your progress, the important thing is to be honest with yourself. Face the truth of your choices, or better yet, celebrate keeping promises to yourself and others.



THERE'S NO TIME LIKE THE PRESENT

Take the time to create new discipline and accountability in 2024, and watch as your life begins to unfold in more intentional ways.



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