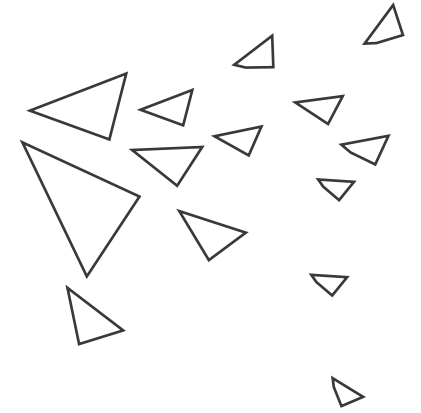




Strategic Planning

A Thoughtful & Intentional Approach to
Nailing Personal & Professional Goals

ap →
PRO
↑ ach

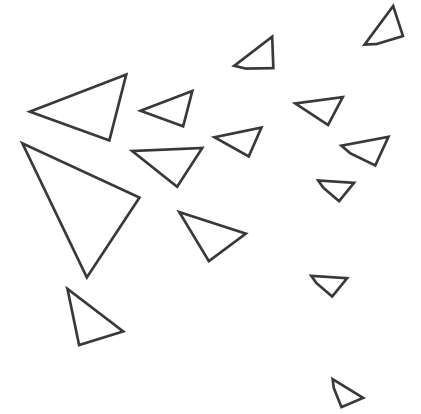


Welcome!

A little about me...

Jess Hasler Southwell

- Roberts Wesleyan alum, Webster resident, wife, dog mom
- INTJ, Enneagram 3, creative problem-solver, servant leader
- 20 years of professional business development and PM experience, founded apPROach in 2019
- Practicing personal development and project management for over a decade



Introductions

Don't be shy!


- Your name
- Your library
- 2 things you hope to accomplish in 2022





Strategic Planning: A Thoughtful and Intentional Approach to Nailing Personal and Professional Goals

- Techniques: Strategic Planning and Project Management
- Targets: Personal and Professional Development
- Twist: Collaborative, Fun, Inspiring, Open, and Safe



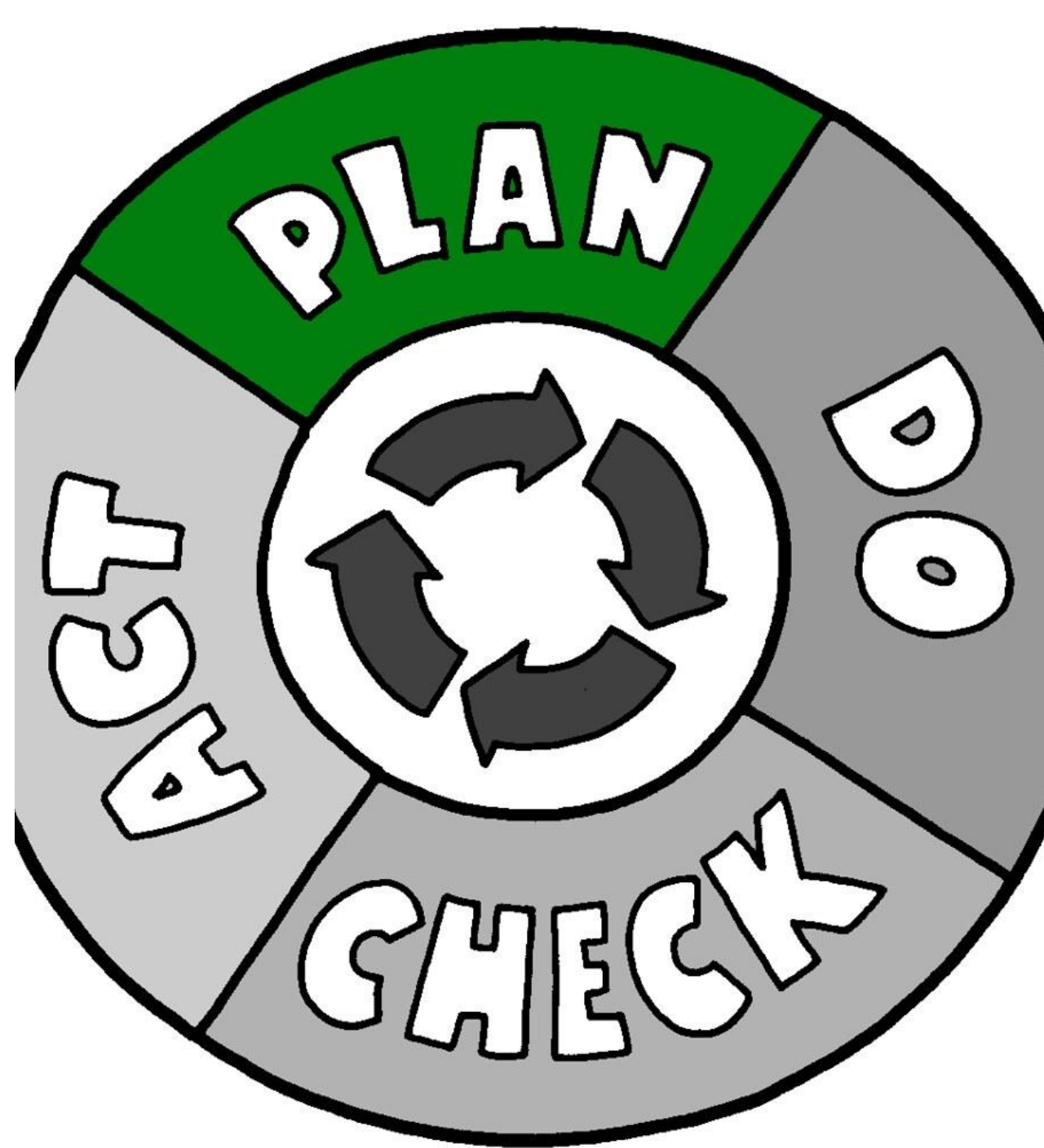
Strategic planning is an activity that is used to set priorities, focus energy and resources.

It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future.

Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

Strategic Planning

Organizations have practiced strategic planning for ages...but it's not just for business.



Strategic Planning Basics


Where are we going?

How do we get there?

How do we know we made it?

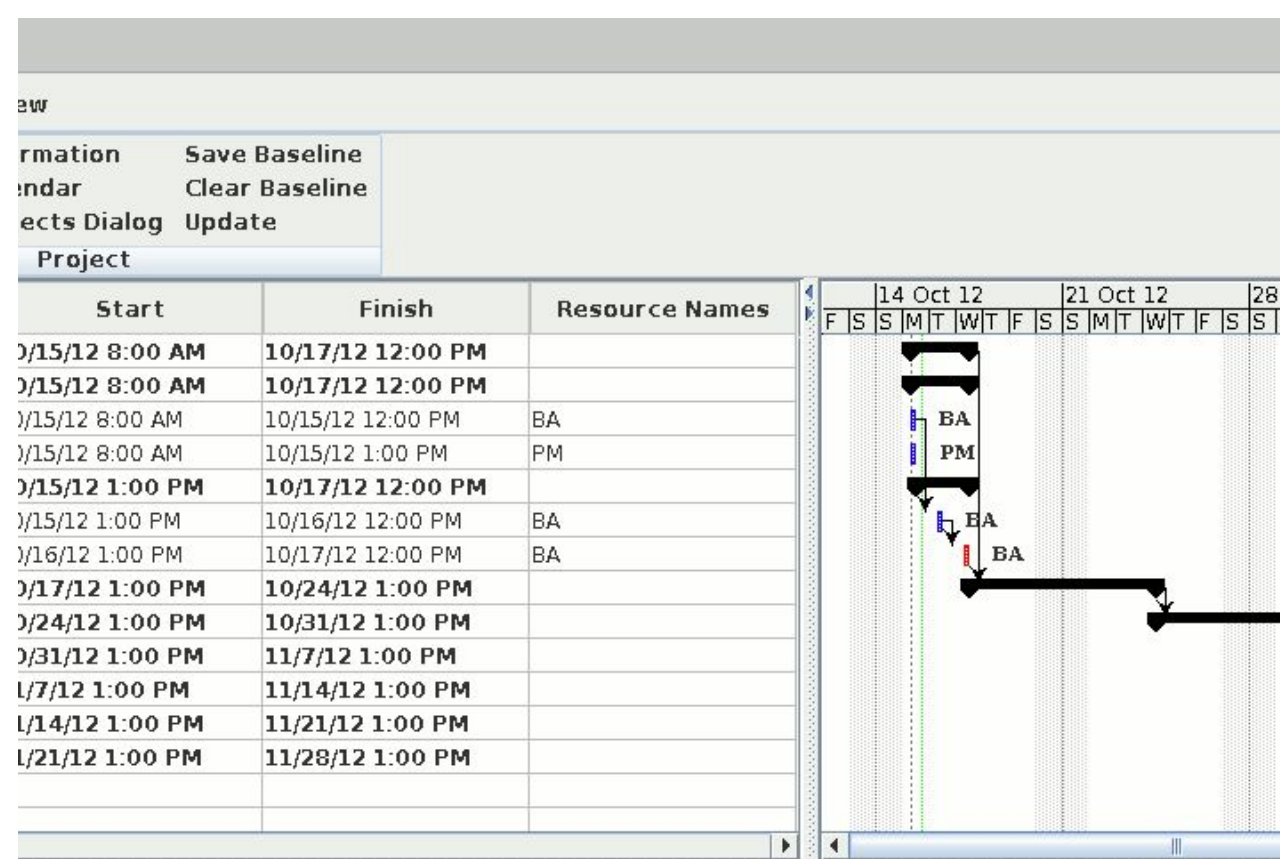
Project Management

Practicing project management helps manage time and resources in professional AND personal endeavors.

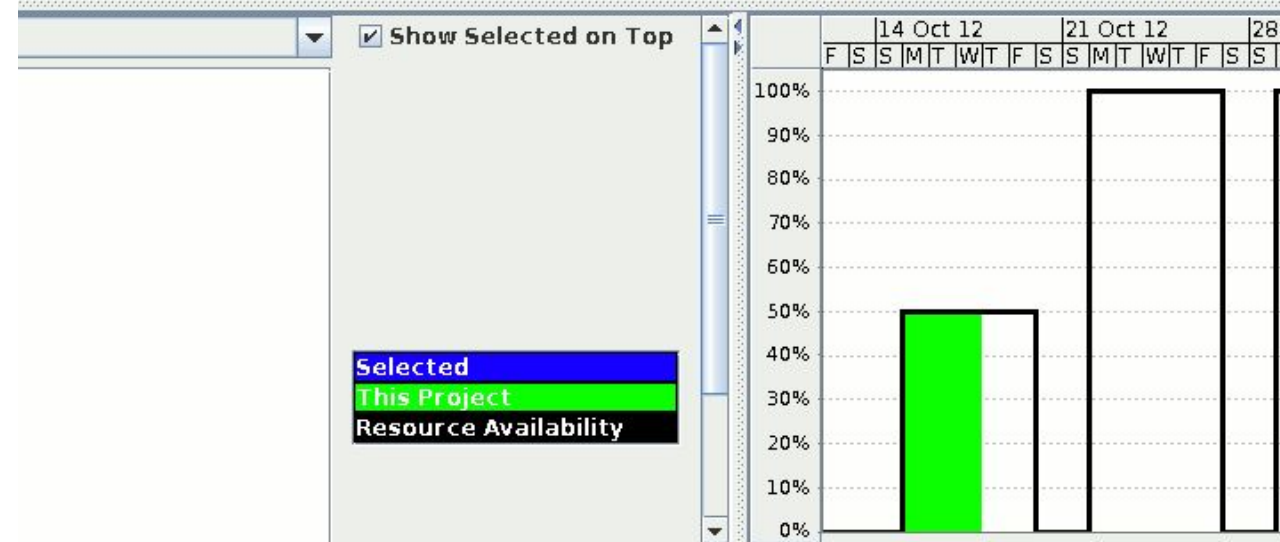


Project management is the practice of leading the work of a team to achieve goals and meet success criteria at a specified time.

The primary challenge of project management is to achieve all of the project goals within the given constraints.



Project Management Basics



- Account for all (or most) of the tasks
- Assign ownership
- Create a timeline
- Consider dependencies

Getting Started: The 360 Evaluation (a bucket analogy)



In business we might include:

- Human Resources
- Marketing
- Sales
- Customer Service/Success

In personal development, we might include:

- Family and Friends
- Health and Wellness
- Home
- Finances
- Work/Career
- Recreation

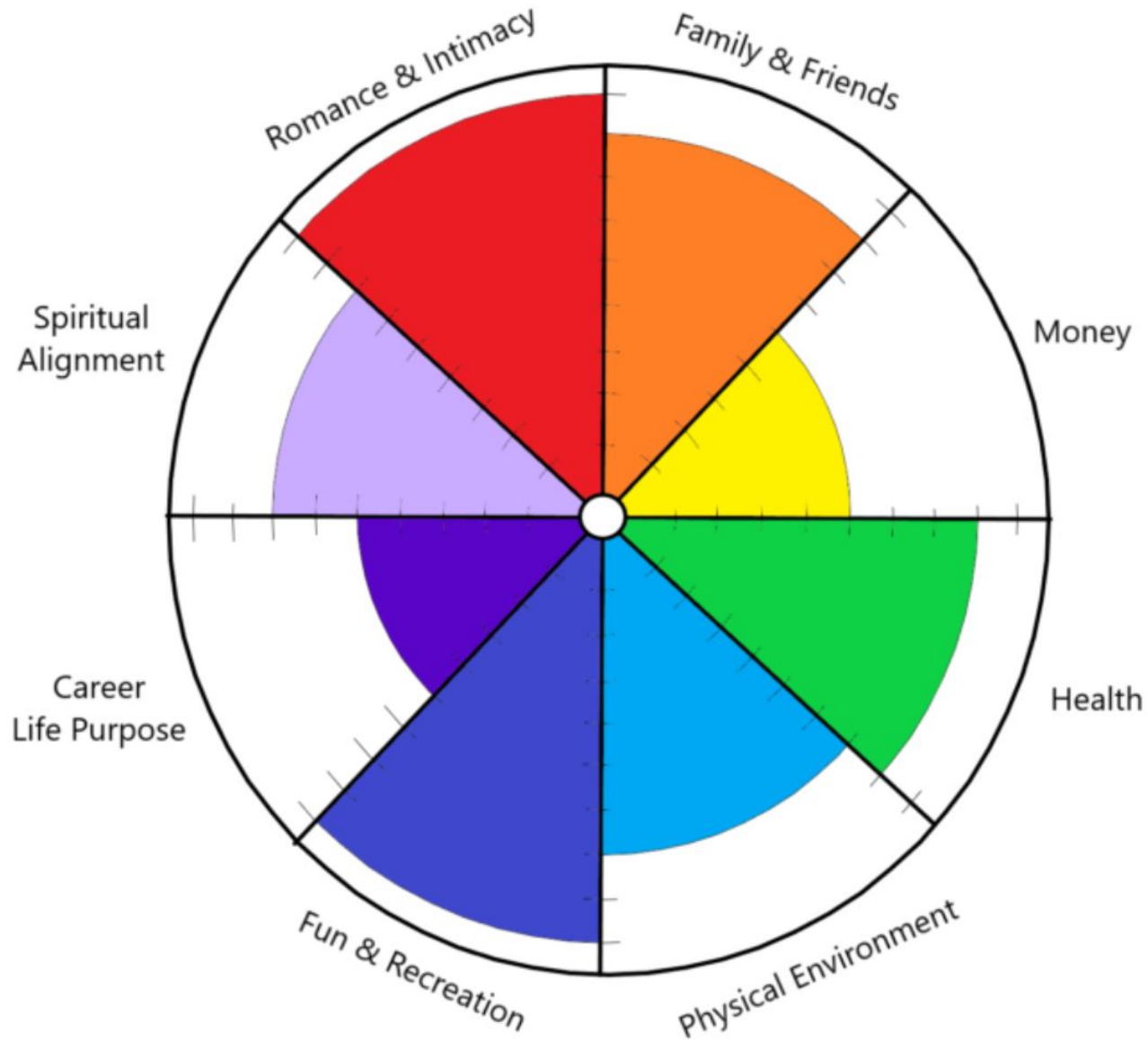
Don't feel compelled to cover everything, you can omit buckets.

Buckets are high-level, details come next.

The Wheel of Life

Created by Paul J. Meyer of the
Success Motivation Institute

These segments are
recommendations, not rules!



For each of your buckets, consider:

1. What is working for me now?
2. What is NOT working?
3. How much time/energy do I spend on this now?
4. Where is the gap?
5. How important is this?

Think through the relationship between #3 and #5.

These prompts work in BOTH personal and professional applications.

Next Step: Dig Deeper



Pandemic Perspective

What has the pandemic taught you about...

Relationships?

Your living situation?

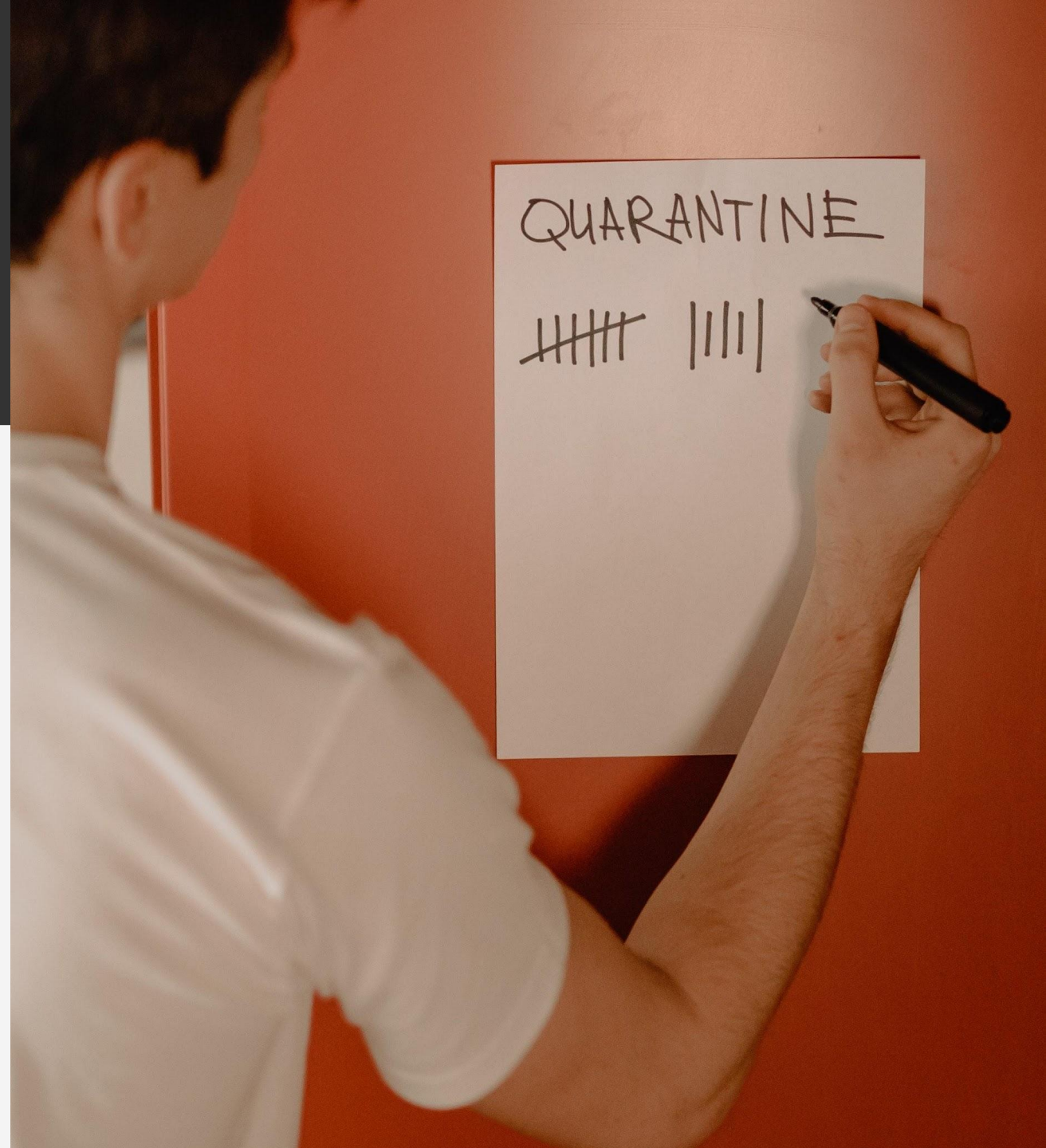
Working from home?

Social justice?

Your priorities?

Organizational culture?

Operational processes?



Digging Deeper with Teams

Consider different ways to gather feedback – surveys, in-person discussion, breakout groups, peace circles

Set expectations before the meeting, share prompts in advance for careful consideration

Assign a facilitator to keep the discussion on track

Record the session or take detailed notes



For each of your buckets, make a list of what you want.

Some examples from the business world:

Human Resources

- Complete diversity and inclusion training
- Complete performance evaluations for all staff

Marketing

- Increase online engagement by 30%

Sales

- Increase sales by 10%
- Decrease sales cycle time

Customer Service/Success

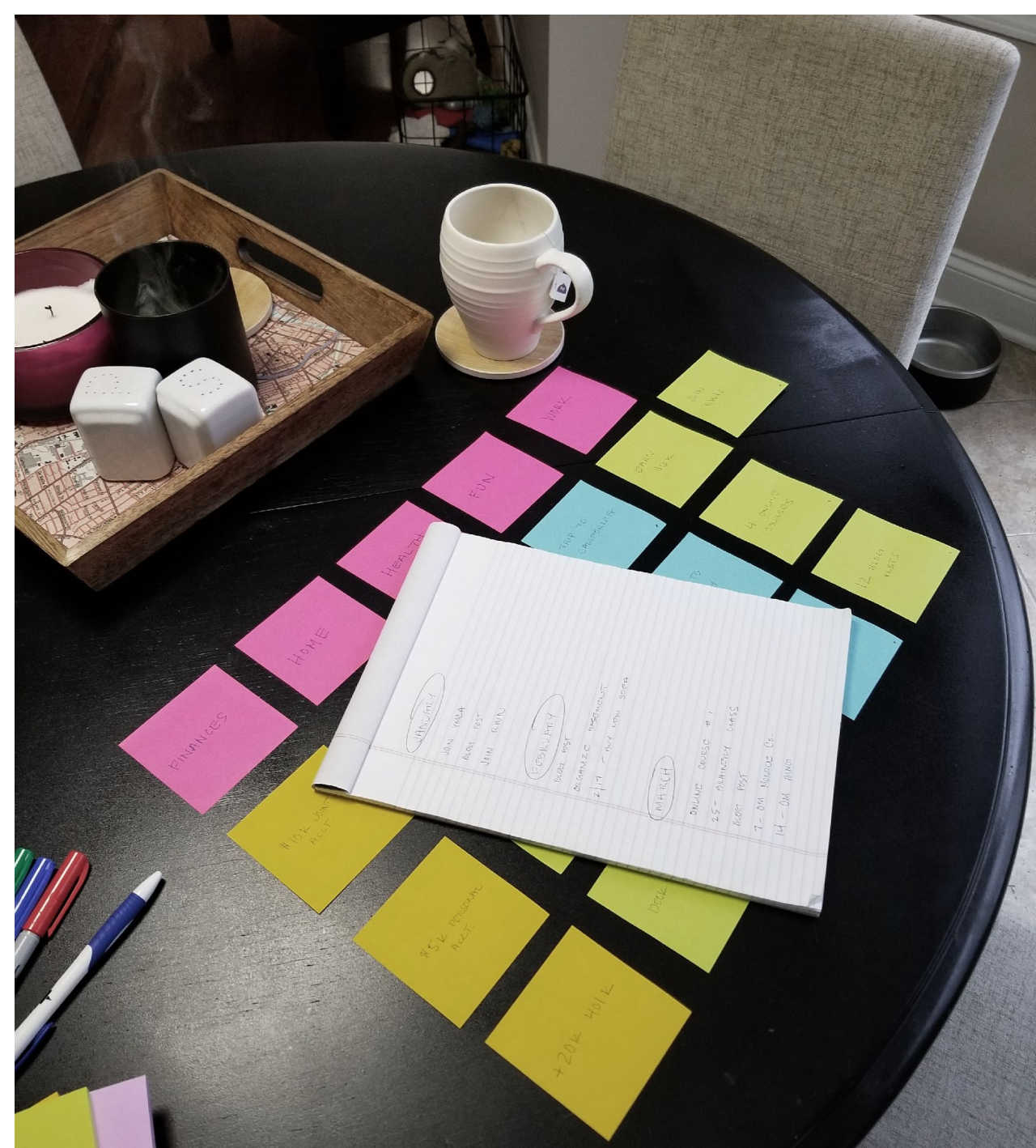
- Measure customer satisfaction quarterly
- Increase customer retention by 5%

Making Lists



to do list
• sketch
• drawing
• 3d model
• material
• call
• product

sketch
- 3 sketch
- free drawings with electric
- pay for drawing only with electric
- 3d work - pay
- sketch up - free
- blender - free
- corona render



The List apPROach

1. Paper list or whiteboard brain dump
2. Post it note or Trello board session to organize
3. Prioritize, assign ownership, and create a timeline

Mind Maps are a great alternative to lists.

Here's a mind map that incorporates the following personal goals:

Health and Wellness

- Prepare healthy meals
- Advance my yoga practice
- Join the YMCA

Finances

- Save 6 mos. expenses
- Increase 401K contribution

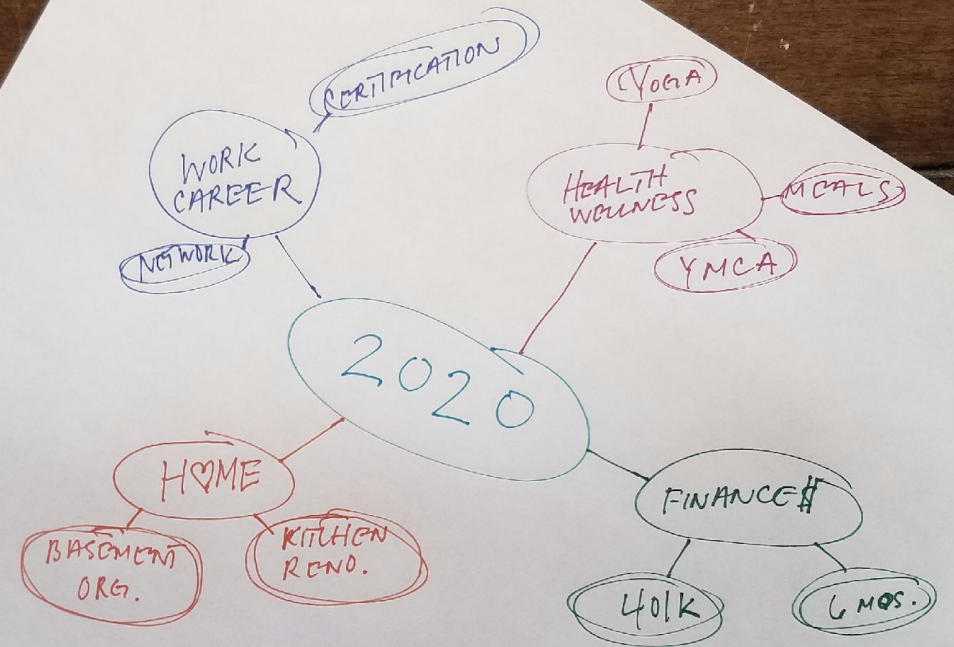
Work/Career

- Expand professional network
- Finish certification program

Home

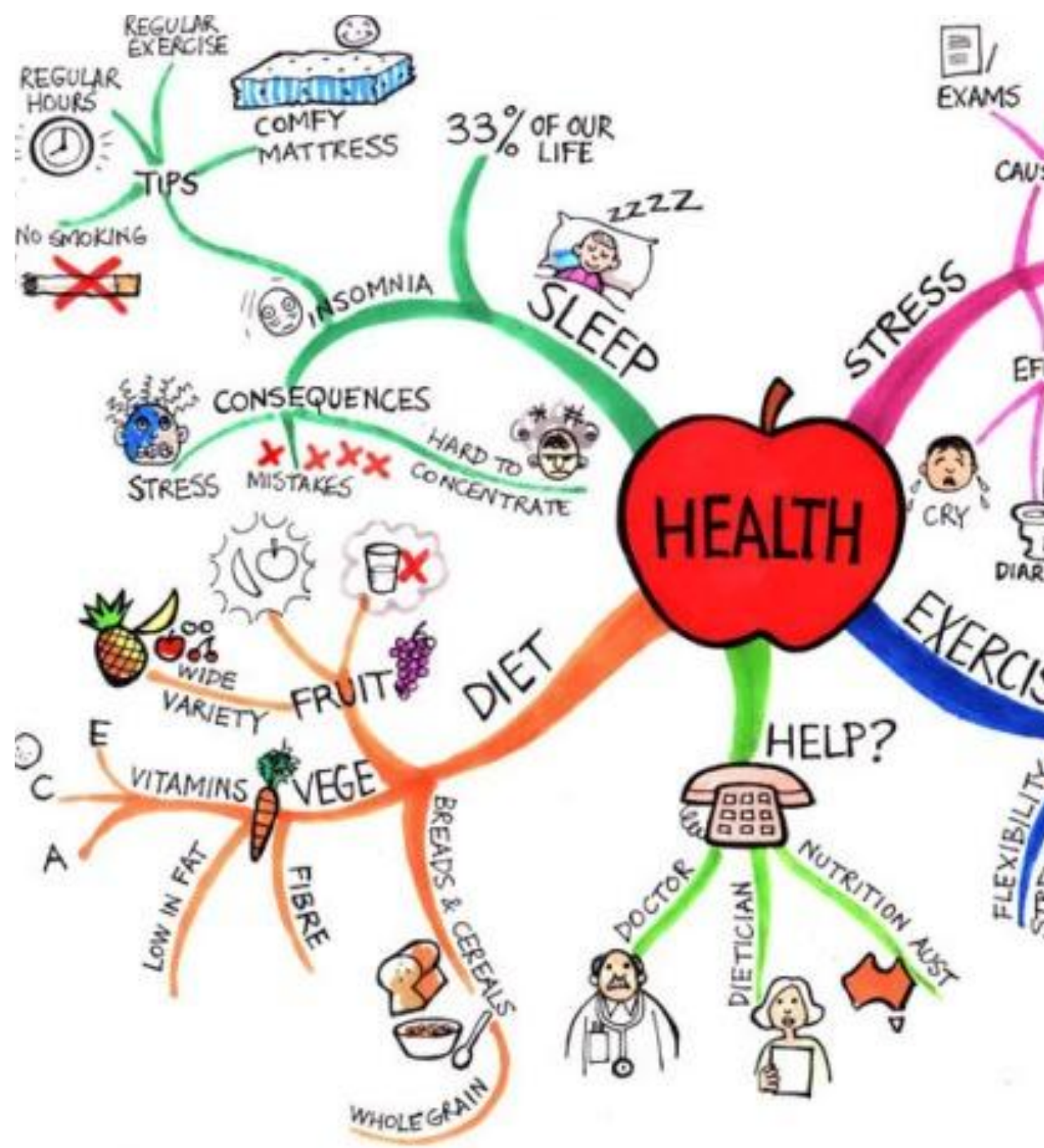
- Update kitchen
- Re-organize basement storage area

Creating Mind Maps



Mind Mapping with Teams

- Great for free-form brainstorming
- Follow mind mapping with prioritization
- Follow prioritization with time and resource allocation



SMART Check

Health and Wellness

- Prepare healthy meals
- Advance my yoga practice
- Join the YMCA

Finances

- Save 6 mos. expenses
- Increase 401K contribution

Work/Career

- Expand professional network
- Finish certification program

Home

- Update kitchen
- Re-organize basement storage area



Task Mastery

Identify ALL (or most) tasks required to complete your goal.

Work/Career

Expand professional network

- Upgrade to LinkedIn Premium
- Reach out to 2 new contacts per week
- Attend 2 online networking sessions per month

Finish certification program

- Complete entrance exam
- Submit application
- Study 5 hours per week
- Sit for final exam
- Update resume and LinkedIn with credentials!

Health and Wellness

- Prepare healthy meals
- Advance yoga practice
- Join the YMCA

Finances

- Save 6 mos. expenses
- Increase 401K contribution

Work/Career

- Expand professional network
- Finish certification program

Home

- Update kitchen
- Re-organize basement storage area



Timelines

“T” is for Time-bound/Timely.

Each task requires a start/end date.

Activities that are ongoing are the exception.

In a team setting, assign ownership for each task.



Assigning Ownership

- If there is more than one owner, assign a lead.
- Try to avoid assigning to teams.
- Be careful to balance the load.

Tracking your progress

***You must MEASURE your progress along the way.
Helpful tools include:***

- Checklists (daily/weekly)
- Spreadsheets
- Goal-setting/Productivity journals
- Goal-setting apps
- Calendars/planners (with room for notations)

***Be sure to schedule time to track progress AND
reflect on progress and barriers to progress.***

***Keep it simple – the easier it is to track progress,
the more likely you are to do it.***





Progress Tracking at Work

- Schedule weekly/monthly/quarterly check ins
- Incorporate into existing meetings if possible
- Give stakeholders ownership through reporting
- Set clear tracking and reporting expectations from the start
- Consider time and tools necessary for progress tracking

Reflection & Modification

- What did you NAIL and how does it feel?
- What didn't work out and what are the barriers to success?
- How can you eliminate those barriers?
- 'AR' check: is this achievable and realistic?
- How does your actual timeline compare to your planned timeline?

Adjust future plans using past data.

Be patient AND nimble.

If the plan
doesn't work
change the
plan, not the
goal.



**KEEP
CALM
AND
LET'S
RECAP**

Recap

- Schedule time to individually or as a team identify the “buckets” or areas to work on
- Encourage teams to prepare in advance for the brainstorming session
- Create a safe place to think out loud using prompts to get inspired and keep ideas flowing
- Brain dump first, organize and prioritize next
- Assign ownership and create a timeline
- Create a way to track your progress
- Learn as you go – assess and adjust

Things to remember

Be generous with yourself.

You're not married to your plan.

Don't wait until December 31st to make resolutions.

Don't over-engineer!

You don't need fancy tools.

Strategic planning is great for:

- Finishing school
- Starting or growing a business
- Getting divorced or separated
- Moving
- Planning for retirement
- Managing health and wellness
- Creating work-life balance

The sky's the limit!

Helpful Links & Future Classes



[SMART goals](#)

[Mind Mapping](#)

[Goal Setting Journals](#)

[Goal Setting Apps](#)

[Quarterly Planning](#)

[Strategic Planning and Divorce](#)

[Planning Your Health and Wellness](#)