

My Personal Strategic Plan

"Without goals, and plans to reach them, you are like a ship that has set sail with no destination."

Fitzhugh Dodson, author and clinical psychologist

All successful organizations work from a strategic plan. Strategic plans help organizations focus on what they want to accomplish and the difference they want to make in the world. It is equally important for individuals to outline and periodically update their Personal Strategic Plan to stay focused on what they want to accomplish and what God wants them to achieve. This form is an aid to help you develop your Personal Strategic Plan. It accompanies a series of podcasts on SkipVaccarello.com.

Feel free to adapt this plan to your needs. More importantly, it should be simple and not become a burden. This document contains the following items:

- Instructions – Elements of your Personal Strategic Plan – Vision, Mission, Core Values, Goals and Key Results
- Possible Core Values -- A list of potential core values to consider
- Appendix I -- The Spiritual Disciplines
- Appendix II -- Your Personal Strategic Plan

Instructions

The following are instructions for how to develop your Personal Strategic Plan.

Step 1 – Your Vision Statement

It is good to begin where you want to end. What is the legacy you want to leave? What are the plans that you sense that God has for you? This becomes your vision statement: how you would like to be remembered. You might even think of it as the obituary you would like someone to write about you after you die. It is not necessarily how you might be remembered today but, ideally, how you would like to be remembered.

First, write a summary statement (i.e., Vision in Brief), such as "I want to be remembered as a person who...." An example of a summary line for someone who wants to be remembered for their generosity might be this: "I want to be remembered as a person who is generous with my time and resources and puts others first, including my family." In one or more paragraphs, expand on your single statement. Note that your vision statement may change over time as your circumstances change.

You should intentionally shape your legacy/vision statement by your actions, which become your mission, core values, and goals and key results.

Sample Vision Statements

The following are sample vision statements to help you develop your vision statement. Remember that your vision statement is who you want to become and how you want to be remembered.

My Vision Example 1

My Vision in Brief, is to be a person admired for my generosity.

My Vision Statement

My vision comes from how I would like to be remembered. This is not necessarily who I am today but who I strive to become.

I strive to be generous with my talents, abilities, opportunities, and resources. I plan to use my skills and abilities effectively to help the organizations where I work to achieve their mission and goals. I want to help my co-workers to work effectively as a team and to take full advantage of their abilities and opportunities.

I want to be generous with my love, time, and resources for my family by helping my spouse and children reach their full potential and experience what it means to be a loving family who cares about each other.

In my community, I plan to give my time generously as a volunteer and my money to support groups and organizations with meaningful goals to make a difference in the world.

My Vision – Example 2

My Vision in Brief, is to be a person of God who lives by the motto "a good and faithful servant."

My Vision Statement

My vision comes from how I would like to be remembered. This is not necessarily who I am today but who I strive to become.

I strive to be a person of God who seeks to love God with my whole heart and soul and to love my neighbors as myself. I want to be a blessing to other people -- an encourager who cares deeply for people and is a humble, effective leader who practices leadership through service and is honest in his dealings with God, people, and myself.

I want to exhibit my Christian values in how I live at home, at work, with my friends, and with others. I strive to be a loving parent and spouse and care for my co-workers. I seek to be a loyal friend and welcoming to strangers.

Finally, I want to use my God-given gifts, talents, and opportunities to make a positive difference in the world.

Step 2 – Your Mission Statement

Write a concise statement of what you want to do or are doing currently to work toward your vision, including work, family, and community activities. Begin with a summary statement (i.e., Mission in Brief) and follow that with one or more paragraphs with a fuller description.

Here is a sample Mission in Brief for someone who wants to be known for their generosity: " My mission is to be generous with my time and resources."

Here is another sample for someone wanting to live out their faith: "My mission is to do God's will, serve others, and draw people to Jesus."

One more example of a Mission in Brief for someone using their technical skills for good: "My mission is to use my technical skills at my job and in my community to make a positive difference in the world."

Note that your Mission Statement may change over time as your circumstances change.

Sample Strategic Plans

Mission -- Sample 1

My mission in Brief: My mission is to be generous with my time and resources.

Full mission statement:

I strive to invest my time and resources to care for my family, friends, people I work with, and in my community.

In my family, I strive to lovingly care for my spouse and children. I plan to be home for dinner with my family nearly every evening and enjoy time away with my spouse and children, including at least two weeks on vacation. I will be generous with my money to care for their needs and to set money aside for future needs for our family, including a college education for my children.

In my work, I work hard, using my skills to help my organization fulfill its mission and to enable the people I manage to strive individually and as a team.

I give generously to charities that my spouse and I admire as making a difference in the world and strive to volunteer at least XXX hours each month.

Mission – Sample 2

My mission in Brief: My mission is to do God's will, serve others, and draw people to Jesus.

Full mission statement:

I will use the platforms I have to work to the best of my abilities and hope to draw people to consider faith.

Specifically, in my job, I will honor God in all I do. I will work with integrity and humility as an encourager of others. As a leader, I will inspire people to do their best, give them credit for our team's successes, and take responsibility when we fail. I will work hard, but not at the expense of my family.

At home, I want to show my love to my spouse and children by spending time with them, encouraging them to fulfill God's purpose, and serving God and others in whatever career path they take.

I endeavor to serve my church and community as a volunteer (Note: you might want to be specific in your role) and help the organizations fulfill their mission.

By my example, I hope to draw people to consider putting their faith in Jesus, but I will also share my faith and hope in words when appropriate and as the Holy Spirit guides me.

Step 3 -- Core Values

Core values are integral to achieving the vision you have for your life. Core values are a small set of deeply held beliefs that drive how you want to behave. Core values guide how to act and are what you would never like to compromise. Identify from two to five core values that are foundational to the way you live. More than five values are not core. They may be important but are not foundational to who you are and want to become.

Name your core values in a word or two and explain them further in another statement or two. For example, if generosity is a core value, you might say, "I seek to be generous with my time and resources, especially in helping those in need." If integrity is one of your core values, you might say, "I strive to be honest in my dealings with God and others and always do what I say I will do."

If you are a follower of Jesus, you may want to add a Bible verse from which your core values derive.

Sample Core Values

My primary core value is love. I seek to show the love of Jesus to everyone with whom I come into contact.

I will show love by practicing my other core values:

Encouragement -- I strive to be an encourager by looking at the good in others and encouraging them on their path in life.

Integrity -- I strive to be honest in my dealings with God and others and do what I say I will do.

Generosity -- I seek to be generous in my time and resources, especially in helping those in need, and to be thankful for all I have.

Humility -- I know anything I accomplish comes from God – the gifts, talents, and drive he has given me. Therefore, I seek not to promote myself but to glorify God in all I do.

A List of Possible Core Values

Below is a list of values to help you decide which are at your core. The list is not exhaustive. There may be a value that is core to you that is not on the list.

As a way to decide on your two to five core values, you might try this:

- Circle 15 values that you feel may apply to you.
- Of the 15 values, cull the list to 10.
- From the list of 10, decide on the top 2 to 5 that genuinely are at the core of who you are.

Remember: Core values are a small set of deeply held beliefs that drive how you want to behave. Core values guide how to act and are what you would never like to compromise. Here is a list of possible core values to consider:

Accountability	Adaptability	Authenticity	Adventure
Balance	Boldness	Bravery	Calmness
Charity	Challenge	Citizenship	Cleverly
Compassion	Consistency	Cooperative	Creativity
Curiosity	Dedication	Determination	Encouragement
Enthusiasm	Ethical	Excellence	Fairness
Faith-driven	Fearless	Freedom	Friendliness
Fun loving	Generosity	Gratitude	Growth
Honesty	Humility	Imaginative	Insightful
Integrity	Justice	Kindness	Knowledge
Leadership	Learning	Love	Loyalty
Openness	Optimistic	Passionate	Positive
Recognition	Respectful	Responsibility	Results-oriented
Security	Selflessness	Self-Respect	Social
Spirituality	Stability	Stewardship	Thankfulness
Thoughtful	Toughness	Welcoming	Wisdom

Step 5 – Goals and Key Results

The following are instructions for developing goals for your Personal Strategic Plan.

It is best to formulate your goals after you have established your vision and mission statements and identified your core values. If you have done that work, your goals will become a natural outgrowth of your work and, more importantly, will lead to establishing your legacy and who you want to become.

What are goals and key results?

Goals are short-term objectives that will help you live out your core values and mission and lead to fulfilling your vision or legacy for your life.

Short-term means a 6-month or 12-month period and should be evaluated monthly or quarterly to see if you are on track or if your circumstances have changed and you need to adjust your goals.

Key results are your actions to accomplish and measure your success in achieving them.

Keep your Personal Strategic Plan alive. After you write out your goals, don't just put them aside and forget about them, like many people do with New Year's resolutions. Review your goals frequently – perhaps monthly or quarterly -- to see how you are doing. At year-end, you might consider using a rating system like this:

1 = accomplished

½ = partially accomplished

0 = not accomplished

Don't get discouraged if you do not score all "1s". You might not have challenged yourself enough if you did get a perfect score. Remember, to become all that you want to become means that you likely must stretch yourself.

After you rate yourself, you may want to have a spouse or close friend review how you are doing. Knowing someone else will check out how you perform will help motivate you to reach your objectives.

To summarize:

- Make your goals relevant to your vision, mission, and values.
- Focus on what is most important now.
- Make them measurable.

What is essential is to make your goals work for you.

The following are two examples of sample goals. One might be for someone single and in college or beginning their career and curious about faith. The second is for an older adult who is a follower of Jesus.

These are only samples. Your job is to come up with goals that work for you.

Sample Goals – Young Adult

Goals and Key Results for 202_

Score ____ out of 5 Goals

(Note: be specific for your situation.)

Spiritual—explore faith traditions and evidence for Christian faith, as measured by:

Score ____

- Gain an understanding of major faith traditions.
- Read the New Testament in the Bible.
- Read a book on the evidence for Christian faith (e.g., The Case for Faith or The Case for Christ by Lee Strobel).

Family and Friends – deepen my relationships, as measured by:

Score ____

- Spend quality with my family members by talking or being with them at least ____ per month.
- Develop a deeper relationship with at least two colleagues with similar interests by spending quality time with each friend at least twice monthly.

Work—advance my career, as measured by:

Score ____

- Study and work hard at what I am doing by doing XXX and YYY.
- Meet or exceed goals as mutually agreed by my manager/mentor/advisor.

Fitness—weigh XXX by year-end, as measured by:

Score ____

- Maintain my physical shape by working out at least five days per week.
- Eat healthy – more fruit and vegetables and less junk food.

Finances—use my money well, as measured by:

Score ____

- Donate at least XXX to charity
- Increase my savings by \$XXXX by year-end.

Community – give back to my community, as measured by

Score ____

- Find a volunteer opportunity.
- Volunteer at least XX hours per month at YYYY.

Sample Goals – Older Adult

Goals and Key Results for 202_

Score ____ out of 5 Goals

(Note: be specific for your situation.)

Spiritual—grow closer to Jesus, as measured by:

Score ____

- Engage in prayer time and read the Bible daily.
- Attend weekly church services.
- Fast for 24 hours once per month.

Family—prioritize family, as measured by:

Score ____

- Deepen my relationship with my spouse and family by spending quality time together, including at least two weeks and three weekends with them away from home.
- Be home for dinner with my family at least five times a week.
- Enjoy a date night with my spouse once per week.

Work—advance my career, as measured by:

Score ____

- Be satisfied with helping my team and the organization achieve its goals for this year.
- By June, hire the two people we need to complete our team.
- Meet or exceed goals as mutually agreed by my manager.

Fitness—weigh XXX by year-end, as measured by:

Score ____

- Maintain my physical shape by working out at least five days per week.
- Eat three servings of fruit and vegetables daily.
- Eliminate soft drinks and reduce my intake of sugar.

Finances —a good steward of my resources, as measured by:

Score ____

- Donate 10% of my income monthly.
- Increase our savings by \$XXXX by year-end.
- Finish our estate plan by year-end.

Community – give back to my community, as measured by

Score ____

- Find my new volunteer opportunity by March and begin to serve in that ministry.
- Volunteer at least XX hours per month.

Appendix I

Knowing Jesus Better

Up to this point, we have discussed how to develop your vision, mission, core values, and goals and key results as a way to build your legacy intentionally. If you are a Jesus follower, growing closer to Jesus is essential to discover who he wants you to become. The Spiritual Disciplines are crucial to knowing Jesus better and his plans for your life.

By practicing the spiritual disciplines, you can make small improvements that lead to a more fulfilling, God-focused life and help you know who God wants you to become and the legacy you will leave.

The Spiritual Disciplines

The two classic books on The Spiritual Disciplines are The Spirit of the Disciplines by Dallas Willard and The Celebration of the Disciplines: The Path to Spiritual Growth by Richard Foster. Consider reading one or both books to become better acquainted with the Spiritual Disciplines.

Foster conveniently divides the disciplines or practices into three categories: inward, outward, and corporate.

The inward spiritual disciplines are:

- Prayer –both talking and listening to God
- Fasting – abstaining from food, drink, or something else to focus on God
- Meditation – deeply contemplating biblical truths and how they might affect you.
- Study – studying God's Word individually or in a group.

The outward disciplines are:

- Simplicity – intentionally ridding ourselves of things that distract you from God
- Solitude – temporarily being silent and withdrawing from the distractions of life to practice the Spiritual Disciplines.
- Submission – submitting to God's authority and not insisting on your way
- Service – doing something for others without expecting anything in return

The corporate disciplines are:

- Confession – owning up when you have wronged someone or God
- Worship – giving yourself entirely to God
- Guidance – hearing God and obeying him
- Celebration – expressing joy for what God has done for you and others

Do not feel burdened about practicing all the disciplines. Practice those that work for you in growing closer to Jesus and becoming the person you want and God desires you to become.

Appendix II

My Personal Strategic Plan

My vision statement (including my vision in brief):

My mission statement (including my mission in brief):

My core values:

My goals for the year ____ :