

Developing Your Personal Strategic Plan

A practical tool for exceptional leaders



Presented by Paul Ciminelli and Cheryl May
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Advanced Management Institute
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A Business Unit of **FMI**

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WHO SHOULD USE THIS WORKBOOK?

This *Developing Your Personal Strategic Plan* workbook is designed for CEOs who are seeking clarity in the direction and purpose of their professional and personal life.

Knowing your purpose in life is critical to your professional and personal development. Creating a personal strategic plan provides you with a compass – pointing in the direction you want to go.



Creating a personal strategic plan is the ultimate exercise in Personal Leadership.

WHAT IS A PERSONAL STRATEGIC PLAN?

A personal strategic plan creates your roadmap of action for the next year – providing a basis for decision-making and standards by which to live. Your personal strategic plan helps you maintain balance in each area of your life, so you are more effective as a leader, spouse, parent, friend, and community member.

Your plan will help you understand where to put your attention and energy, how to balance the different aspects of your life, and how to know when something is going out of balance in time to take corrective steps.

WHY CREATE A PERSONAL STRATEGIC PLAN?

Although you may know your life's mission intuitively, or have a personal mission statement, you may have found that you have difficulty living in alignment with it, and taking action to make it come about. As a CEO you are charged with setting the direction for your employees, aligning resources to ensure everyone is working in the same direction, and motivating everyone to work towards organizational goals. A personal strategic plan can help you keep your life in balance so that you can more effectively perform each of these functions.

Setting Direction

Creating a personal strategic plan is a powerful exercise in taking leadership of your own life. You have probably experienced the frustration of trying to juggle your roles as CEO, employer, parent, spouse and community member. Having a personal strategic plan can lessen these struggles by keeping you focused on what really matters in your life, both professionally and personally. It helps to clarify the fundamental philosophy and personal values under which you wish to operate, as well as how these values affect your roles in life.

For CEOs facing many demands and responsibilities, it is easy to over commit to one area of life, then to turn around and overcompensate in another. For example, a leader who is falling out of balance may spend six months working day and night on a huge project, only to realize that he/she has hardly seen the kids – and tries to make up for it by showering them with toys or splurging on a spectacular vacation, when what they want and need is an engaged parent.

Another example is the CEO who knows that ignoring a personal exercise regimen and too much weight gain are not healthy, yet takes no action because “I can’t afford the time away from work.” How many of those CEOs end up in the emergency room, the cardiologist’s or oncologist’s office – at great detriment to the very business they thought they were serving? We all want to be healthy, but unless we set a goal to take care of *me* and outline the actions needed, it is unlikely to happen spontaneously.

Having a personal strategic plan can enable you to better articulate to yourself, colleagues and family members what personal work you are engaged in each year, and why these things are important to you.

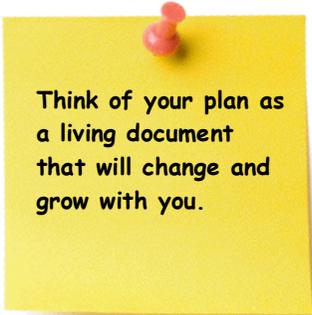
Aligning Resources

Creating a personal strategic plan helps you identify how you should best prioritize your time and talents, as well as where you should invest your life. It will enable you to identify activities that encourage the kinds of personal development that will most help you achieve your goals and live your life in balance. There are no “right” activities that everyone should engage in – your plan will help articulate what is “right” for you.

YOUR PERSONAL STRATEGIC PLAN IS A LIVING DOCUMENT

Think of your plan as a living document that will change and grow with you. By keeping your plan in front of you, you will always know whether you are in alignment with your goals, whether any action you contemplate fits into your plan, and whether or not your life is in balance.

You should plan to evaluate your progress regularly, perhaps every other week or every month, with a major review once a year. You might consider going on an annual retreat – perhaps with family – and set aside time to review and update your plan.



Think of your plan as a living document that will change and grow with you.

THE FIVE AREAS OF YOUR PLAN

Your personal strategic plan for each year will cover five areas:

- **Me** – your personal goals for yourself, including physical and spiritual goals.
- **Family** – goals for your spousal relationship, parenting, and personal social life with friends and family.
- **Business** – identify a limited number of goals to accomplish each year in your work with others in the company.
- **CEO** – as the CEO your job is to watch the horizon for trends affecting the business, to create and lead the firm’s vision, to develop yourself as a CEO, to identify and develop your successor, and so on. Identify what you will do this year to develop as a CEO.
- **Community** – Your goals for being involved in your community, perhaps including charitable giving, volunteer work, coaching a sports team, or some other option.

CREATING YOUR PERSONAL STRATEGIC PLAN

Step ① – ME: Your Personal Goals

For each area below, list your priorities and think of the simplest, most logical first step you can take. It may be tempting to put down that you want to lose 40 pounds, run in a marathon, meditate every day – but the reality is that such big changes won't fit into your current schedule or patterns of behavior. Too big of a change will be exciting for a week, then fun for ten days, then disruptive after two weeks – and then you'll stop.

So what level of change can you actually take on? Pick something very simple and sustainable to start with. Once you get good at managing your personal strategic plan, you will know your own capacity for change and you can bite off appropriate chunks.

Remember, this plan is only for this year. At the end of the year you'll review your plan, see what you accomplished, and set new goals for next year.

Example:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Physical:</i>	<i>Lose 5 pounds and improve cardio fitness.</i>	<ul style="list-style-type: none"> • <i>Buy a bicycle</i> • <i>Ride to/from work twice a week. Build up to where I can ride several miles without stopping.</i> <p>OR</p> <ul style="list-style-type: none"> • <i>Buy running shoes</i> • <i>Run 2 days per week. Build up to where I can run one mile without stopping.</i>
<i>Spiritual:</i>	<i>Make time for prayer or contemplation every week.</i>	<ul style="list-style-type: none"> • <i>Get up 1/2 hour early one day a week and spend that time in a quiet spot. No cell phones.</i>
<i>Other:</i>	<i>You may want to consider setting other goals such as intellectual or emotional.</i>	

Remember that your goals need to be achievable, and if it is something like adding an exercise regiment to your life, it needs to be realistic.

OK, it's your turn.

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Physical:</i>		
<i>Spiritual:</i>		

<i>Other:</i>		
<i>Other:</i>		

Step 2 – FAMILY: Your Goals for your relationships, family and friends

Example:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Spouse:</i>	<i>More time with my spouse.</i>	<ul style="list-style-type: none"> • <i>Calendar schedule one date night per month with spouse.</i>
<i>Children:</i>	<i>Establish solid relationship with son before he goes to college.</i>	<ul style="list-style-type: none"> • <i>Plan one activity with son per week.</i>
<i>Other Family:</i>	<i>More activities for senior mom.</i>	<ul style="list-style-type: none"> • <i>Investigate senior center activity schedule.</i>
<i>Friends:</i>	<i>Maintain closer friendships.</i>	<ul style="list-style-type: none"> • <i>Organize annual ski trip.</i>

Your plan:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Spouse:</i>		

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Children:</i>		
<i>Other family:</i>		

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Friends:</i>		
<i>Other:</i>		

Step ③ – Business: What business goals will you accomplish within your firm this year?

This section is not about your company’s goals for the year, but *your* goals for specific initiatives you want to take yourself or foster within the firm this year.

Example:

	<i>What results I want</i>	<i>What’s the first step?</i>
<i>Empowering young executives</i>	<i>Give developing executives challenging assignments to learn from – without jumping in myself!</i>	<ul style="list-style-type: none"> • <i>Let people do their work.</i> • <i>Let them come to me for help instead of stepping in and taking over.</i>
<i>Develop more consistency</i>	<i>Become more consistent in my approach.</i>	<ul style="list-style-type: none"> • <i>Make a simple list of how I want to handle stress, difficult situations, opportunities, celebrations.</i> • <i>Check with myself before reacting to any situation – am I being consistent?</i>

Your Business Goals for this year:

	<i>What results I want</i>	<i>What’s the first step?</i>
<i>Goal 1:</i>		

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Goal 2:</i>		
<i>Goal 3:</i>		

Step ④ – CEO: How will you develop yourself as the CEO this year?

Example:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Scanning the horizon</i>	<i>Identify 3 trends that will affect our firm next year.</i>	<ul style="list-style-type: none"> • <i>Subscribe to Futurist magazine.</i>
<i>Development inside the organization</i>	<i>Improve my listening skills with employees.</i>	<ul style="list-style-type: none"> • <i>Build inquiry by asking questions first before giving my opinions.</i>
<i>Development outside the organization.</i>	<i>Build a peer relationship with 3 other CEO's this year.</i>	<ul style="list-style-type: none"> • <i>Attend the NAIOP CEO Retreat.</i>

Your CEO Development Goals for this year:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Scanning the horizon:</i>		

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Development inside the organization</i>		
<i>Development outside the organization.</i>		

Step ⑤ – Community: How will you contribute to your community this year?

Examples:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Charitable Giving</i>	<i>To become an engaged giver.</i>	<ul style="list-style-type: none"> • <i>Give of my time first and money second.</i>
<i>Volunteer work</i>	<i>Make a meaningful contribution.</i>	<ul style="list-style-type: none"> • <i>Contact a local university about mentoring students, guest lecturing.</i>
<i>Community organizations</i>	<i>Get involved on a board of directors.</i>	<ul style="list-style-type: none"> • <i>Use my area of expertise to chair a master plan committee for a major renovation of a state hospital.</i>

Your Community Participation Goals for this year:

	<i>What results I want</i>	<i>What's the first step?</i>
<i>Charitable Giving?</i>		

<i>Volunteer work?</i>		
<i>Community organizations?</i>		

<i>Other</i>		
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HOW TO USE YOUR PERSONAL STRATEGIC PLAN

Having a plan helps you check and see if you're staying on track with your goals. Using it becomes a way of life – this isn't a one-time event, but a lifestyle change. You should keep your plan in front of you as much as possible, and review it to see how you're doing on a regular basis.

Your personal strategic plan offers you a baseline to measure against. Are you taking action in each of the areas you identified?

Always look for areas that you need help with. Your plan can – and likely needs to be – a collaborative effort. Identify those who you know you well enough and who spend enough time with you to let you know if you get off track.

This could be your spouse, your executive coach, or friends in the community. Share your plan with them, and then meet on a regular basis to review where you are, perhaps at a monthly breakfast meeting.

Keep your plan simple. Continue to look for areas that are out of balance...if you are taking a lot of action in one area and not in the others, you are falling out of balance. Take action early.

You may want someone to help you with only a specific area. Determine if you need extra help from your executive coach or a trusted friend. Consider that someone outside your industry can give you a different, fresh perspective.

MAINTAINING YOUR PERSONAL STRATEGIC PLAN

The key to maintaining your personal strategic plan is simplicity and regular review.

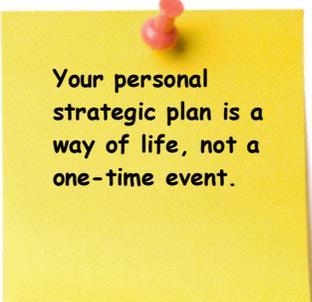
You should have an appropriate number of achievable goals for each area - if this is your first time using a personal strategic plan, three goals in each area may be a good start. Be wary of the temptation to create a long list of goals that you won't really be able to accomplish.

Make it easy to regularly review your goals:

- schedule time to review your plan every month;
- keep your goals in front of you – in your Blackberry, on your desk, as your screen saver.



Take a collaborative approach to your personal strategic plan and enlist help in getting feedback.



Your personal strategic plan is a way of life, not a one-time event.

Plans are only as effective as they are fresh and usable. Set an annual time for deep reflection and use it to update your plan for the next year. Consider taking a personal retreat or a family retreat, and set time aside to think deeply about your plan, and set new goals for the next year.

Remember to celebrate your accomplishments! It is not easy to change our behavior or our selves. or to take control of our time and where we put our energy. In addition to looking ahead, give yourself time to review and take pride in what you have accomplished.

MAKING A COMMITMENT TO WORKING YOUR PLAN

Anyone who has ever tried a crash course in anything – dieting, exercise, learning a new language – can tell you that trying to make a change can be difficult.

Make a commitment to yourself to work your plan for at least a year. Give yourself a chance to work through all your goals, to find your “plan partners”, to get used to having a plan and reviewing it regularly.

This isn't a one-time event – it's a lifestyle change.

<p><i>What steps will you take to commit to your plan?</i></p>	
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What will your life feel when your plan is working?

How does it feel when you're not in balance? How do you know you are drifting out of balance?

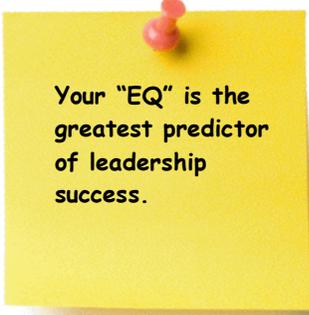
What steps will you take when you identify that you are getting out of balance?

EMOTIONAL INTELLIGENCE

Emotional Intelligence is the ability to monitor one's own and others' feelings and emotions, to discriminate among them and to use this information to guide one's thinking and actions. This includes an array of competencies and skills that are strong factors in driving leadership performance.

Daniel Goleman's model of Emotional Intelligence as it applies to business outlines four main areas:

- Self-awareness — the ability to read one's emotions and recognize their impact while using gut feelings to guide decisions.
- Self-management — involves controlling one's emotions and impulses and adapting to changing circumstances.
- Social awareness — the ability to sense, understand, and react to others' emotions while comprehending social networks.
- Relationship management — the ability to inspire, influence, and develop others while managing conflict.



Your "EQ" is the greatest predictor of leadership success.

All four of these areas are part of the CEO's toolbox, and are an important part of using and benefiting from the personal strategic plan.

READING FOR SELF DEVELOPMENT

Part of your plan for either developing yourself or scanning the horizon for your firm's benefit likely involves expanding your reading.

Here are some books that may offer you help and ideas for your self-development.

- Dan Baker, Cameron Stauth, *What Happy People Know: How the New Science of Happiness Can Change Your Life for the Better*, St. Martin's Griffin, 2004.
- Malcolm Gladwell, *Blink: The Power of Thinking Without Thinking*, Bay Back Books, 2007.
- Daniel Goleman, *Emotional Intelligence: Why It Can Matter More than IQ*, Bantam Books, 2006 (Updated anniversary edition.)
- Gregg Levoy, *Callings: Finding and Following an Authentic Life*, Three Rivers Press, 1998.
- David Whyte, *The Three Marriages: Reimagining Work, Self and Relationship*, Riverhead Hardcover, 2009.

ADDITIONAL TOOLS FOR YOUR DEVELOPMENT: ASSESSMENTS

One of the most often quoted sayings applied to leadership is the ancient inscription over the lintel at the temple of Delphi: *Know thyself*. Self-knowledge has become a keystone of modern leadership development, and many tools have been developed that can help us understand our own strengths, communication styles, development challenges, and so on.

These instruments are typically administered by a certified practitioner who is trained in the interpretation and debriefing of the results, and how you can best make use of them.

Harrison Assessments

Harrison Assessments provides proven tools to assist in the selection, recruitment and development of employees. For CEOs, there is an 'upper management template' that allows you to compare your individual traits, preferences and competencies to other senior leaders across North America. This tool also allows you to incorporate your company's values and culture into the assessment for the purpose of employee selection, development and retention. The Harrison allows you to leverage the strengths of your potential and existing employees and discover the hidden paradoxes or inconsistencies that can impact job performance and satisfaction.

Myers-Briggs Type Indicator® (MBTI®)

The Myers-Briggs Type Indicator® (MBTI®) assessment offers a foundation for understanding individual differences and applying that understanding to the ways people think, communicate, and interact. The MBTI assessment is used to develop individuals, teams and organizations to meet today's challenges in such areas as communication, team building, leadership and career management. Form Q has 144 items and provides not only the four-letter type but also results for 20 facets of that type. It requires only 20 minutes to complete.

Fundamental Interpersonal Relations Orientation–Behavior® (FIRO-B®)

The Fundamental Interpersonal Relations Orientation–Behavior® (FIRO-B®) assessment helps people understand their own behavior and that of others in interpersonal situations. It is used to clarify human interactions in both business and personal situations. It explores three basic interpersonal needs (Inclusion, Control and Affection) along two dimensions (Expressed and Wanted). The FIRO-B assessment can be used as an integral part of team-building initiatives, management training programs, personal development plans and communication workshops. Requiring only 15 minutes to complete the 54 items, the FIRO-B tool quickly sets the stage for self-understanding

Thomas-Kilmann Conflict Mode Instrument (TKI)

The Thomas-Kilmann Conflict Mode Instrument (TKI) is the world's best-selling instrument for conflict resolution. The 30-item, forced-choice inventory identifies a person's preferred conflict-handling mode, or style, and provides detailed information about how he or she can effectively use all five modes—competing, collaborating, compromising, avoiding and accommodating. Using the TKI, individuals can learn to move beyond conflict and focus on achieving organizational goals and business objectives. Organizations can apply the TKI to such challenges as change management, team building, leadership development, stress management, negotiation and communication. This assessment should take about 20 minutes to complete.

FMI 360° Feedback

FMI 360° Feedback Assessment is a tool to provide focus, clarity and insight into individuals and organizational development and performance. FMI 360° Feedback provides a critical element in your toolkit for successful individual and organizational development. Managers, peers, customers, direct reports and others can provide anonymous ratings and comments on a variety of skill, knowledge, ability and behavioral areas. These ratings and comments combine to provide you with a comprehensive report on an individual to assist in personal and professional development. This is the most effective tool available to diagnose the workplace accurately. In addition, FMI's web-based system ensures anonymity and confidentiality.

Emotional and Social Competency Inventory (ESCI) 360 Assessment

The Emotional and Social Competency Inventory (ESCI) 360 Assessment is a tool that shows how you think you are doing against how others perceive you. This is comprised of your own self-awareness, your ability to relate to others, and your ability to manage your own emotions and to manage relationships with others. The competencies are not fixed abilities and can be developed by the individual through first recognizing strengths and areas for improvement and then following up through coaching. You will be receiving feedback from your managers, direct reports, peers as well as yourself. This assessment should take about 30 minutes to complete. This assessment tool measures:

- Self-Awareness - Knowing your emotions and their effects
- Self-Management - Knowing how to manage your emotions, how to keep disruptive impulses in check. Being flexible and comfortable with new ideas
- Social Awareness - An ability to listen, to be persuasive, to collaborate, to nurture relationships
- Relationship Management - An ability to influence others, handle conflicts, develop, lead and work with others

Natural Ability Battery (NAB)

The Natural Ability Battery (NAB) is the state of the art assessment tool that objectively measures an individual's innate abilities. The NAB report identifies individual abilities that link to key leadership competencies. The 19 timed work samples can be completed in multiple sessions or in one continuous session; way, it will take approximately three hours to complete. This assessment:

- Provides insight into your natural leadership abilities
- Describes your ideal work environment, job type, and learning style
- Explains how these abilities impact your leadership style, decision-making and problem solving effectiveness

DiSC[®] Personal Profile System

The DiSC[®] Personal Profile System is personality behavioral testing profiling using a four-dimensional model of normal behavior in an assessment, inventory, survey format. The four behavior DiSC model domains are Dominance, Influence, Steadiness and Conscientiousness. It is used to improve lives, interpersonal relationships, work productivity, teamwork and communication. It is based on the 1928 work of psychologist Dr. William Moulton Marsten. The 28-question DiSC Profiler should take about 10-15 minutes to complete.

ABOUT THE PRESENTERS

Paul Ciminelli, President and CEO, Ciminelli Development Group

As President and CEO, Paul has been instrumental in positioning and obtaining many of Ciminelli Development Group's key projects over the last two decades. These initiatives include:

- the purchase of the former Federal Reserve Building in downtown Buffalo, and its ensuing redevelopment for New Era Cap Company;
- contracting with First Niagara Bank to provide facilities management services for its 1,000,000 sq. ft. across New York State;
- contracting with a New York-based ownership group to provide management and leasing services for both Key Center and the Bank of America Building in downtown Buffalo;
- the formation of Ciminelli Real Estate Corporation, Ciminelli Real Estate Services of Florida, and Ciminelli Real Estate Corporation of Canada;
- the formation of Allpro Parking, LLC, Western New York's premier parking operator.

Paul holds a B.S. in Business Administration from the State University of New York at Buffalo, and a Certificate of Finance from the University's School of Management. As a strong proponent of the Buffalo Niagara region, he is also actively involved in many civic, professional and non-profit organizations.

Cheryl May, Director of Strategic Leadership Development, Advanced Management Institute

Cheryl is committed to inspiring clients to think creatively and make distinctive, enduring and significant improvements to their lives, their firm, the industry and the world. Her work with architecture and engineering firms has included the design and delivery of Project Management programs, strategic planning initiatives, executive coaching, organizational needs assessment, team-building, facilitation, negotiation, individual assessment, succession management and on-boarding.

Cheryl specializes in coaching leaders and their teams through an effective focus on the people side of the business. She has helped A/E firms with the design and development of leadership development and project management programs. She is an expert in the use of numerous assessment instruments and cultivates trust with clients to create environments that foster teamwork, innovation and heartfelt customer service.

NOTES
