[Enter Name Here]

**Personal & Professional Strategic Plan**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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Emerging Women Leaders Coaching Circle

A Conspire Coaching & Consulting, LLC Initiative

[www.emergingwomenleaderscircle.com](http://www.emergingwomenleaderscircle.com)

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# Welcome to your Strategic Plan!

**This plan is your companion to the Emerging Women Leaders program**. Use it as your anchor and reference point. You will work on it, and re-work it, and add to it. You will be prompted to use it at times. You will be drawn to work on it organically at other times. All of the key concepts and coaching work we do can find a place here in your strategic plan. It is a draft, a work-in progress. It will emerge along with you. There is no right way, or wrong way of doing it and you will necessarily require guidance and collaboration to complete it.

**This template is an invitation.** Choosing to work on it is accepting to be the designer of the next chapter of your life and career. You are choosing to do the smart, intentional thinking about your life in a way that you have always done for the teams you serve on and/or lead.

**This document is likely to bring up all sorts of emotional responses.** They might include:

* Feeling totally and completely overwhelmed
* Pure joy and momentum
* Spurts of energy followed by depressing crashes
* A sense of taking control of your next chapter
* Resistance to naming goals, committing to new habits
* Fear of stating what you really want for your life
* Relief to fully own who you are becoming and what your life is about
* Satisfaction in identifying and prioritizing concrete goals and actions

**Whatever your responses are, they are right and good and perfect.** They are the raw materials to work with in a coaching environment. Please ensure that you notice what comes up for you as you work your way through your strategic plan. If you get stopped, overwhelmed or anxious, that is your clue that you should reach out to your coach or your co-conspirator to get un-stuck.

The document suggests some timing and processes that work with the schedule of the Emerging Women Leaders coaching circle. ***At times, the schedule might not fit where you are in your process. That’s ok***. You are encouraged to reach out to your coach to support you in figuring out the best way to tackle the sections of this plan. Finally, you may decide that you want to skip certain sections. This document is yours and it is in service to your own self-knowledge and productive action. **Tweak, delete, add, morph – consider it a launching point.**

# Use this Strategic Plan to Deeply Engage with EWL

Look for the following symbols throughout the strategic plan to help you engage the support of eConspire resources, your coach, your co-conspirator, and the other EWLs via the Google Group and Board of Directors sessions.

|  |  |
| --- | --- |
| unstuck.gif | **Try these activities to get unstuck.** This symbol refers you to additional resources and exercises on eConspire that will help you to complete the section. You won’t need to do these exercises for every section of your strategic plan, but you will find them helpful when you are stopped, stuck, or confused. |
| phone-person.jpg | **Talk it through.** This symbol refers to ideas you can use to work through the section of your strategic plan with your **Co-conspirator** or with **your coach**. |
| emerging women leaders.png | **Engage your Board.** This symbol highlights how you might gain the support of the other EWLs in your cohort by bringing this topic to one of your **Board of Directors Sessions** and/or how you might reach out for help using the **EWL GoogleGroup**. |
| make-a-note.jpg | **Make a note**. Periodically the plan asks you to make a note of possible **goals, actions, and BIG questions** to record for future reference. Ultimately, you will review, prioritize, and solidify these notes into an actionable plan. |

# Schedule for completing your Strategic Plan

This table sets out each component of the Strategic Plan creation process and provides a sense of how each element fits into the EWL program. Jen will work with you to set out a personalized deadline to complete each component.

|  |  |  |  |
| --- | --- | --- | --- |
| **Section** | **Description** | **Pacing** | **Your Deadline** |
| **Value Strings** | A set of activities to clarify your values and priorities as they apply to the next chapter of your life. | Completed before Kickoff |  |
| **Big Questions** | A place to hold and track your major questions about what’s next for you. Writing these down will set you on the path to discovering the answers. You will periodically be prompted to *make a note* of these as you complete exercises. | Between Kickoff and the first BOD session |  |
| **Vision** | A statement about the life you envision yourself living x year(s) from now. Choosing a time frame within which to begin working towards this vision is the first major choice in this design process. | Between Kickoff and the first BOD session |  |
| **Mission** | A statement that clarifies your life purpose. Through activities such as one-on-one coaching, Board of Directors Sessions, Seminar work and conversations with your co-conspirator, you will have opportunities to eliminate choices and *ways of being* that no longer align with your mission. Furthermore, you will begin to clarify activities that enliven you and fulfill your mission. | Between Kickoff and the first BOD session |  |
| **Goals** | You will identify three goals that will be the focus of your work throughout the year. The *one-year* period begins with your EWL Kickoff. This section records goals that you are considering. You will be prompted to *make a note* of these as you complete exercises. Refer to table at the end of the document for recording your goals. | Note the goals can be as specific as you identify them. It is ok if you do not identify three immediately. Note possible goals in the *Possible Goals* section at the end of the document. |  |
| **Goals, SWOT and Milestones** | These are your final goals for the year. Beneath each is a place to conduct a SWOT analysis (identifying the strengths, weaknesses, opportunities and threats of any given goal). Identifying the key milestones toward achieving your goal will help guide your progress throughout the rest of the year. | At least one by first BOD.  At least two upon completion of Strongest Self |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Career Ingredients** | This step will focus on exercises that help identify your talents and strengths and clarify what must be present in order to feel as though you are thriving and satisfied in a career. You will identify three elements that must be present in any role you take on in your next chapter. | First draft: between Kickoff and the first BOD session  Revised draft: After Strengths seminar |  |
| **Signature Strengths** | You will work with your Co-conspirator to begin to build an image of how you best contribute in your work environment. Building on the Key Career Ingredients exercise, you will use the *StrengthsFinder* format to identify three strengths that you are known for in your organization/field. | First draft: between Kickoff and the first BOD session  Revised draft: After Strengths seminar |  |
| ***StrengthsFinder* 2.0 Themes** | These are the results of, reflections about and possible goals and actions that stem from an assessment of your strengths using the *StrengthsFinder* format. | Prior to the Strengths Based Leadership and Development Seminar. Date: \_\_\_\_ |  |
| **Strongest Self Analysis** | Through a framework Jen provides, you will ask people who know you well to give you concrete stories that demonstrate your strengths. You will ask them to answer the statement, “*When I have seen you at your very best, here are the unique strengths you have displayed*.” Using these responses you will analyze, reflect, and consider possible goals and actions to build upon them. | Prior to the Strengths-Based Communication Seminar. Date: \_\_\_ |  |
| **Positioning Statement** | You will develop a simple statement about who you are in relation to at least one of your goals. You will be able to utilize the statement to project a clear image of yourself to others and frame intentional conversations about your career goals and vision. | After Strengths-Based Communication Plan |  |
| **Relationship Mapping** | **You will choose one of three relationship maps to complete and will document your analysis of this mapping experience here.** | **Prior to the Developing Mentors and Champions Seminar** |  |
|  |  |  |  |

At the end of the document is a Monthly Action Plan template. This document will help you choose what to focus on at the beginning of each month. It will give you an opportunity to revisit your strategic plan and assess what’s most important to work with in the month ahead. It will also tie together the pieces from your Board of Directors meetings and other elements of EWL.

# My Goals

## Step 1: Record your goals

What are three goals you have for this year? (The starting point of the year is the Kickoff of your EWL Coaching Circle). Note these may not be clear when you start this process. Work we do together during EWL on values, strengths, branding and relationships may uncover important goals that you have not yet considered. **If you have definite goal(s) that you want to commit to, note them here.** Otherwise, jot possible goals down in the *Possible Goals* section at the end of this document.

**Goal #1:**

**Goal #2:**

**Goal #3**

## Step 2: Complete an initial SWOT Analysis and Identify Possible Actions, Milestones and deadlines

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Strengths & Opportunities** | **Weaknesses and Threats** | **Intermediate milestones (to track progress)** | **Deadline** |
| Goal #1 |  |  |  |  |
| Goal #2 |  |  |  |  |
| Goal #3 |  |  |  |  |

## Step 3: Refine your SWOT through conversation with your coach and Co-Conspirators

|  |  |
| --- | --- |
| phone-person.jpg | With your coach, complete at least one SWOT analyses collaboratively. Complete the remaining two SWOTs with your Co-conspirator. Identify possible actions to build upon strengths, leverage opportunities, overcome weaknesses and mitigate threats. |
| make-a-note.jpg | Make note of possibilities before you are ready to make definite commitments:   * Record all possible actions in the *Immediate Actions I am Considering* section. * Record Big Questions that still need to be clarified before setting goals in the *Big Questions* section. |
| emerging women leaders.png | Get into action on your goals through the BOD sessions   * Request a Brainstorming session to develop possible actions to build upon strengths, leverage opportunities, overcome weaknesses or minimize threats in one of your BOD sessions. * Request an Action Challenge session to help you get moving on one of your goals (or one aspect of your goals!) * Request a Fishbowl or Hot Seat session to help you clarify a goal or to move past what’s stopping you from achieving it. |

# My Values

Your Values Strings are the backbone of all of your work in EWL. Please refer to your [Career & Life Values Assessment](http://www.conspirecoaching.com/career--life-satisfaction-assessment.html) to list your *prioritized* list of value strings and your current level of satisfaction with each in the table below. Remember, your values should be prioritized by which you would like to be MOST present in the next chapter of your life and career.

|  |  |
| --- | --- |
| **Prioritized Values Strings** | **Satisfaction Rating**  (1-low – 10-high) |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6 |  |
| 7. |  |
| 8. |  |
| 9. |  |
| 10. |  |

## From Values to Strategy

## make-a-note.jpg

1. Think about what **personal and/or professional goals** you could set during your time frame that would increase your satisfaction with one of your high-priority values. Make a note of these possible goals.
2. Think of any **immediate actions** you could take to increase your satisfaction with one of your high-priority values. Make a note of these in the Immediate Actions section of this document.
3. What **BIG questions** come up for you when you look at your values and related actions and goals? Make a note below in the ***My* *Big Questions section.*** *(e.g. What if I decide that I cannot live-out my most important values in my career? Is there a way to reconcile my value of financial security with my value of spending most of my days “doing good?” How will I know if I have what it takes to start my own business?)*

# My BIG Questions

Your BIG questions are those questions you want to answer to help crystallize your VISION, MISSION, and GOALS for the chapter of your life that you are designing. Before you embark on your strategic planning, take a few minutes to jot down the big questions about your next life and career chapter that you are setting out to answer. In addition, throughout this document you will be prompted to record your BIG questions. Do that here.

|  |  |
| --- | --- |
| **BIG Questions** | **What will be possible as a result of answering this question?** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6. |  |
| 7. |  |
| 8. |  |
| 9. |  |
| 10. |  |
| 11. |  |
| 12. |  |
| 13. |  |
| 14. |  |
| 15. |  |
| 16. |  |
| 17. |  |
| 18. |  |
| 19. |  |
| 20. |  |

# My Vision

## Step 1: Draft version 1.0 of your vision for your defined time-frame

Take no more than 15 minutes to draft a description of your life, x years from now. This should be a life in which you are most satisfied, fulfilled and feeling alive. It is completely fine to have more than one version of your vision. Also feel free to type outside the text box below or to make it bigger! This is your document. Draft your vision here:

## Step 2: Get Unstuck When Working on Your Vision



**This** [**Conspirational Vision Kit**](https://dl.dropbox.com/u/28284526/EWL2013/1to1/Conspirational%20Vision%20Kit.docx) **will help ensure you have a thoroughly developed vision.**

* **Vision Stuck-Buster #1:** Set a timer for 15 minutes. Complete 20 statements completing the sentence, “Wouldn’t it be nice if…”
* **Vision Stuck-Buster #2**: *Map* individual vision statements for each of your value-strings.
* **Vision Stuck**-**Buster #2:** Make a list of the various aspects of your life then draft an individual vision statement for each.

*See* [*this link*](https://dl.dropbox.com/u/28284526/EWL2013/1to1/Conspirational%20Vision%20Kit.docx) *for detailed instructions for each of these.*

## Step 3: Debrief your Visioning Work with Your Co-Conspirator

|  |  |
| --- | --- |
| phone-person.jpg | **Talk through the following questions with your co-conspirator and note your answers below:**   * Which aspects of your initial Vision draft and your Stuck-Buster statements are most clear? * Which aspects of your vision feel appropriately specific? Are there aspects that you shy away from specificity? What holds you back? * Which vision elements feel the most attainable? * Which vision elements do you most question your ability to achieve? |

## Step 4: Draft your refined vision in the space below. Draft it in the present tense as though your future were happening right now.

## Step 5: Be ok with this vision as it is.

* Leave it – let it soak in.
* Be ok with not being sure how you will achieve the vision.
* Commit to the vision anyway.

## Step 6: From Vision to Strategy

# make-a-note.jpg

1. Think about what **personal and/or professional goals** you could set to bring you closer to your vision. Note these in the Possible Goals section.
2. Think of any **immediate actions** you could take to set you on your path to achieving your vision
3. What **BIG questions** come up for you about your vision and how you will achieve it? Make a note below in the ***My* *Big Questions section.***
4. ***Choose to believe that your vision is attainable****. Post visual reminders in places that will most inspire commitment to your vision. For example, you could print out and post your completed Vision Stuck-Buster activities.*

# My Mission

Your mission is a concise sentence or set of sentences that describe your purpose in life. Having a personal mission will help you gain clarity about your choices, goals and priorities.

## Step 1: Just write!

*In the space blow, draft a 1st draft mission statement that states what your purpose in life is.*

|  |  |
| --- | --- |
| **unstuck.gif** | Step 2: Discover the essence of your mission Use this [**Conspirational Mission Kit**](https://dl.dropbox.com/u/28284526/EWL2013/1to1/Conspirational%20Vision%20Kit.docx)  to help you discover your mission. It contains three exercises:   * **Mission Stuck-Buster #1:** Set a timer for 15 minutes. Complete 20 statements completing the sentence, “As a result of my life, what is possible for the world is…” * **Mission Stuck-Buster #2**: Complete the Online Franklin Covey Mission Builder. * **Mission Stuck**-**Buster #3:** Make a list of the various aspects of your life then declare the possibilities that would result by living these aspects the way you’d most like to. result |

## Step 3: Debrief your Mission Work with your Co-Conspirator

|  |  |
| --- | --- |
| phone-person.jpg | **Talk through the following questions with your co-conspirator and note your answers:**   * What did you discover by completing the mission exercises? * If you were being your boldest self, how would you adjust your draft mission? * If you wrote something that stopped you, confronted you, or raised some other emotional response, consider that this might be something powerful to include in your mission. * If you could make an impact on people or the world in one (or two) ways, what two words would describe that impact? Make sure these words are in your mission statement. |

## Step 4: Draft a “final” concise 1-3 sentence mission statement in the space below.

## Step 5: Be ok with this mission as it is

Leave it – let it soak in.

## Step 6: From Mission to Strategy

# make-a-note.jpg

1. Think about what **personal and/or professional goals** you could set to align what you’re focused on with your mission. Note these in the “Possible Goals” section.
2. Think of any **immediate actions** you could take to start living your mission more fully. Note these in the “Possible Immediate Actions” section.
3. What **BIG questions** come up for you as a result of drafting a mission statement? Make a note below in the **My Big Questions section.**
4. **Let your mission guide your choices and actions**. Post your mission where you will see it frequently.

# Key Career Ingredients

Your three career ingredients are the three criteria that any job must have in order for you to be fulfilled and to be your best professional self. These are non-negotiable. Read over your Vision, Mission and Values Strings. Then, answer the question: **What three ingredients MUST be present in my job in the next chapter of my career?** Note your three ingredients in the diagram below.

# Signature Strengths

You will be doing extensive work on strengths a few months into the Emerging Women Leaders experience. **Leave this section blank** until you are prompted to start working on it.

## Step 1: Document Your Five *StrengthsFinder* Strengths

Read [StrengthsFinder 2.0](http://www.amazon.com/s/ref=nb_sb_ss_c_0_8?url=search-alias%3Dstripbooks&field-keywords=strengths+finder+2.0&sprefix=strength%2Caps%2C232) and document your five *StrengthsFinder* Themes here:

|  |
| --- |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

## Step 2: Work with Your *StrengthsFinder* Results

|  |  |
| --- | --- |
| phone-person.jpg | **After the seminar on Strength Based Leadership and Professional Development, discuss the following questions with your co-conspirator and record your answers below:**  Which of your natural talents is under-developed, but also highly valued by your organization?  Which of your natural talents is fully developed as a strength AND highly valued by your organization?  Which of your natural talents is not fully developed and also not valued by your organization?  Which of your natural talents is highly developed but not valued by your organization? Is this an indicator that you need to move on? If not, would you like to influence the organization to take more advantage of this talent? Alternatively, are you ok not fully using this talent right now? |
| emerging women leaders.png | **Consider how you might work with strengths in your next BOD session. For example:**  Request a Brainstorming or Action Challenge session for ideas on how to develop one of your *StrengthsFinder* themes  Request a Fishbowl session to take a look at how your most dominant theme plays out at work and uncover hidden opportunities for growth and development. |
| make-a-note.jpg | **Make a note of new self-knowledge to consider how to put it into action.**  What possible goals might you add or how might you tweak your current goals after thinking more about your strengths? **(Update “Possible Goals” and/or your final “Goals”).**  What immediate actions could you consider utilizing the strengths you’ve identified? **(Update the “Immediate Possible Actions” section)** |

## Step 3: Strongest Self Analysis:

Look for the themes that are common to each example given and compile these theses using the table below:

|  |  |  |
| --- | --- | --- |
| Commonality/Theme | Examples Given | My Interpretation |
| 1. Creative | 1. Innovative builder of new projects at work,  2. Found new solutions for old problems  3. Guided the company in transforming itself | My ideas tend to be bold and creative. I tend to bring a new vision to people. I am innovative and a builder. |
| 2. | 1.  2.  3. |  |
| 3. | 1.  2.  3. |  |
| 4. | 1.  2.  3. |  |
| 5. | 1.  2.  3. |  |
| 6. | 1.  2.  3. |  |
|  |  |  |
|  |  |  |

## Step 4: Reflect Upon the Strongest Self Data

Answer the questions below and send them to your Co-Conspirator and coach when prompted. You will complete this prior to the Seminar on Strength-Based Communication.

**Which example is your favorite? Why?**

What have you learned about your own key strengths and uniqueness?

**What was surprising to you about your feedback?**

What circumstances bring out your best?

**What are some ways to capitalize upon this feedback? What are some potential new goals or action steps that might result?**

What career or life implications does this feedback hold?

**What has changed or shifted as a result of obtaining this feedback?**

Who provided the data? What did you learn about them?

## Step 5: Strengths-Based Communication

After the seminar on Strengths-Based Communication, you will send a draft of to your Coach and Co-conspirator for feedback and workshopping. Once you have it (them) finalized, record them here:

|  |  |
| --- | --- |
| **Positioning Statement #1** | *[enter text here]* |
| **Positioning Statement #2 (If applicable)** | *[enter text here]* |

Which *branding* activities are important for you right now?

* Review online presence to assess the strength and consistency of my brand
* Review my resume and job search materials for the strength and consistency of my brand
* Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Step 6: My Signature Strengths

# Relationship Mapping

You will choose one of three [relationship maps](https://dl.dropbox.com/u/28284526/EWL2013/Seminars/Relationship%20Mapping%20Worksheet.docx) to complete and will document your analysis of this mapping experience here. Once you complete your relationship map, insert a photo or copy of it in the space below.

# My Possible Goals for the Upcoming Year

|  |  |
| --- | --- |
| **Possible Goal** | **What is important about this possible goal?** |
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# Immediate Actions I am considering

|  |  |
| --- | --- |
| **Possible Immediate Actions** | **What is significant about this action?** |
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# Monthly Action Plan Template

You will make choices each month about how to put your goals and EWL work into action. [Submit this Monthly Action Plan](https://dl.dropbox.com/u/28284526/EWL2013/CoConspire/MonthlyActionPlan.doc) to your Coach and your Co-conspirator at the beginning of each month.