FEDERATION OF DEFENSE & CORPORATE COUNSEL
FDCC
DEFENSE LAWYERS. DEFENSE LEADERS.



Become Your Own CEO

By Frank Ramos, Jr.

A Publication of the Federation of Defense & Corporate Counsel

About the Author

Francisco ("Frank") Ramos, Jr.



Francisco ("Frank") Ramos, Jr. is the Managing Partner of the Miami litigation boutique firm of Clarke Silverglate, P.A., where he practices in the areas of personal injury defense, product liability, employment and commercial litigation. He served on the board of the Defense Research Institute (DRI) and is a member of the Federation of Defense and Corporate Counsel (FDCC), where he serves on its Board of Directors and has served as co-chair of the Deposition Boot Camp, the Art of Marketing Seminar and the ACT Initiative. He is a Past President of the Florida Defense Lawyers Association and Past Chair of the Eleventh Judicial Circuit Historical Society. He has served on the boards of the Miami-Dade County Defense Bar Association, FIU Honors' Alumni Association, FIU Alumni Association, Parent to Parent of Miami, Miami Legal Services and Florida Christian School.

This is Frank's 20th book. His other nineteen books include - Go Motivate Yourself, From Law School to Litigator, The Associates' Handbook, Attorney Marketing 101, Training Your Law Firm Associates, SLDO Strategic Planning Manual, Future of Law, Social Media Musings – My Reflections on the Practice and Life, The Practice and Process of Law – Checklists for Every Occasion, Be Your Own Life Coach, LinkedIn for Lawyers, Getting Published for Lawyers, Social Media Musings - Part 2, Confessions of a Latino Lawyer, The Associate Whisperer, Social Media Musings – Part 3, You're Hired, Question Everything and Strategic Planning for Law Firms. He has written over 400 articles and has edited five books - The Defense Speaks, The Trial Tactics Defense Manual, The Deposition Manual, Leadership for Lawyers and The Public Speaking Manual. Please follow him on LinkedIn, where he posts daily and has over 55,000 followers, or feel free to e-mail him at framos@cspalaw.com.

DEDICATION

To Ana
Let's keep sprinting

To David and Michael
Keep playing.

Table of Contents

Introduction 1

SECTION 01 **The Role of the CEO**

How CEOs Succeed 5
How CEOs Transform 6
How CEOs Think 7
How CEOs Lead 8
How CEOs Motivate 8
How CEOs Inspire 9
How CEOs Plan 9
How CEOs Set Goals 10
How CEOs Achieve Goals 10
How CEOs Manage 11
How CEOs Improvise 11

SECTION 02 **Corporate Strategic Planning**

Why Do Companies Prepare Strategic Plans? 13
What's in a Corporate Strategic Plan? 13
Purpose of Strategic Plans 14
Developing Strategic Plans 15
Implementing Strategic Plans 15
The Mission 16
The Vision 16
The Values 16
First Principles 17
Brainstorming 17
The Plan 17
Goals 18
Action Steps 18
Timetable 18
Improvise 19
Accountability 19

SECTION 03 **Personal Strategic Planning**

Why Prepare a Personal Strategic Plan? 21
What Can You Learn from Corporate Strategic Plans? 21
Brainstorming Your Strategic Plan 22
Journaling 22
Personal Survey 23
Personal Strategic Plan 25
Personal Strategic Forms 26
Your Talents 26
Your Passions 27
Your Dreams 29
Your Mission 30
Your Vision 31

©2021 Federation of Defense & Corporate Counsel

Your Values 32
Your First Principles 33
Your Purpose 34
Your Destiny 34
Your Goals 35
Your Plan 35
Your Action Steps 36
Your Timing 36
Your Deadlines 37
Your Talents 37
Your Passions 37
Your Dreams 38
Your Mission 38
Your Vision 38
Your Values 38
Your First Principals 39
Your Purpose 39
Your Destiny 39
Your Goals 39
Your Plan 40
Your Action Steps 40
Your Timing 40
Your Deadlines 40
Your Written Strategic Plan 41
Holding Yourself Accountable 45
Evolving a Plan 46
Improvisation 46

SECTION 04 **Beyond Personal Strategic Planning**
Prepare a Strategic Plan for Your Company or Firm 48
Prepare a Strategic Plan for Your Non-Profit 49
Prepare a Strategic Plan for Your Trade Association 50
Prepare a Strategic Plan for Your House of Worship 51
Prepare a Strategic Plan for Your Family 53

SECTION 05 **Teaching Strategic Planning**
Empowering Others to Strategically Plan 55
Teaching Others to Strategically Plan 56
Creating an Army of Strategic Planners 56

SECTION 06 **The Future of Strategic Planning**
Automating Strategic Planning 58
Using Technology for Strategic Planning 59
Changing the World through Strategic Planning 59

SECTION 07 **Appendix of Sample of Strategic Plans**
Sample Strategic Plan for a Company 61
Sample Strategic Plan for a Start Up 62
Sample Strategic Plan for a Non Profit 63
Sample Strategic Plan for a Trade Association 64
Sample Personal Strategic Plan 65
Sample Family Strategic Plan 66

©2021 Federation of Defense & Corporate Counsel

Introduction

Strategic Planning. I first heard these words about 20 years ago at a board meeting for Parent to Parent of Miami, a non-profit serving the needs of parents with special needs children. My older son, David, a toddler at the time, had been diagnosed with Sensory Integration Dysfunction (SID), a sensory processing disorder often confused with autism. Looking for answers, I stumbled across the organization. They needed a lawyer and I needed answers, so when asked to join the board I jumped at the chance. Every board member had a child with special needs. The organization was small but scrappy, never turning away a parent looking for hope. It needed to grow. It needed resources. It needed cash. Lots of cash. So the Executive Director, Isabel Garcia, who today, is President and CEO, realized we needed a strategic plan. She explained we needed to define who we were, why we existed and where we were going. There were too many unmet needs in the community, and we needed to do more. So we met as a board. A lot. From those late night meetings was born a strategic plan to chart the course for the organization. The plan worked. Fundraising exploded. Volunteers joined. Third parties offered free services. It was transformational. To this day, Parent to Parent of Miami is a beacon in South Florida. Its outsized role is due in no small part to strategic planning – it defined its purpose, developed a plan to achieve it and implemented the plan, tweaking it along the way.

Since that first foray as a board member, I have had the privilege and pleasure of serving on numerous boards of non profits and trade associations (Florida Defense Lawyers Association, Defense Research Institute, Dade County Defense Bar Association, Miami Legal Services of Greater Miami, Florida Christian School, the 11th Judicial Circuit Historical Society, Florida International University's Alumni Association, Florida International University's Honors College) and have assisted these organizations craft their strategic plans. I co-wrote a book on strategic planning for voluntary associations (A Guide to Strategic Planning for State and Local Defense Organizations) and have helped voluntary bar associations across the country develop and implement strategic plans. Our own law firm has engaged in strategic planning, and I have advised other law firms about the process. Along the way, I realized that strategic planning can help individuals as much as it helps companies, law firms, trade associations, non profits and charities. Each of us can benefit from personal strategic planning. Each of us can benefit in defining and pursuing our purpose and embracing our destiny.

©2021 Federation of Defense & Corporate Counsel

This book is our journey for you to:

- Define your purpose for your career and your life.
- Develop a personal strategic plan to achieve your purpose.
- Develop the skills and tools to set goals, reduce goals to tasks, perform those tasks and measure successful completion of those tasks.
- Teach others – your company, your co-workers, your family, your community - to do all of this and empower them to achieve their purpose.

By applying the same approach and technique CEOs of companies, big and small, use to succeed, you too will succeed.

This book is divided into seven sections:

I The Role of the CEO

In order to become your own CEO and develop your personal strategic plan, you must first learn to think, feel and communicate like a CEO. This section will take you into the mind of CEOs and will explain what they do and how they do it. A CEO, reduced to her essence, defines the mission and vision of an organization and equips, guides, inspires and motivates her team to achieve it. She is the lodestar the organization follows, and the rudder, that directs them there. She is to the company who you need to be in your own life. She is your spirit animal. She is the embodiment of who you need to become. We'll study her and you'll learn from her.

II Corporate Strategic Planning

The CEO directs a company's strategic plan. The CEO defines the why, what and how of her company. She crafts the mission and vision, identifies its values and principles, directs its purpose, spells out its goals and develops a plan to achieve them. She leads the creation and implementation of her company's strategic plan. She draws up the map, states where X marks the spot and then leads her team on the treasure hunt. Brainstorming, imagining and crafting a strategic plan is a process, and this section demystifies and explains this process. Knowing how companies strategically plan will provide you the tools to personally strategically plan.

III Personal Strategic Planning

Applying what you learned in the last section, you will learn how to develop and pursue your own personal plan. The process begins with exploring your purpose. By defining your talents, passions, dreams, mission, vision, values and principles, you will define your purpose and reveal your destiny. Each of us has a purpose in this world. It is imbued in us, stored in our hearts and minds, to be mined and explored and pursued with every fiber of our

©2021 Federation of Defense & Corporate Counsel

being and with every ounce of strength in our bodies, spirits and souls. A life half lived, a life directed on the wrong path, a life chasing another's dreams like a child chasing a kite out of reach, is not a life. To avoid living the wrong life, define who you are, define your why, define your what and your how, and pursue it all with reckless abandon. By doing this you will find joy, satisfaction and fulfillment. This section will teach you to how to do this, all of this.

IV Beyond Personal Strategic Planning
Once you learn how to develop and craft a personal strategic plan, you can lead your company, your non-profit, your trade association, your house of worship and your family to do the same. Strategic planning helps and behooves every organization, every entity, every group and every person.

V Teaching Strategic Planning
After learning how to plan strategically, you can teach others to do the same. Strategic planning is a critical skill for any professional. If you teach others this critical skill, you will empower them to change and improve themselves, their communities and the world.

VI The Future of Strategic Planning
Technology, including increased use of artificial intelligence, data mining, analytics and automated feedback will streamline and facilitate the use and implementation of strategic planning in the near future.

VII Appendix of Sample Strategic Plans
The book concludes with a series of samples of strategic plans for every person, organization and occasion. These sample plans will guide you in developing your own.

This book is born of the simple premise that you must learn your purpose, develop a plan to pursue it and do the hard work to effectuate the plan. It's quite simple. Living a purposeful life is quite simple. Achieving your wildest dreams is quite simple. This books reveals the simplicity of it all. Create a plan, work the plan. Create a plan, work the plan.

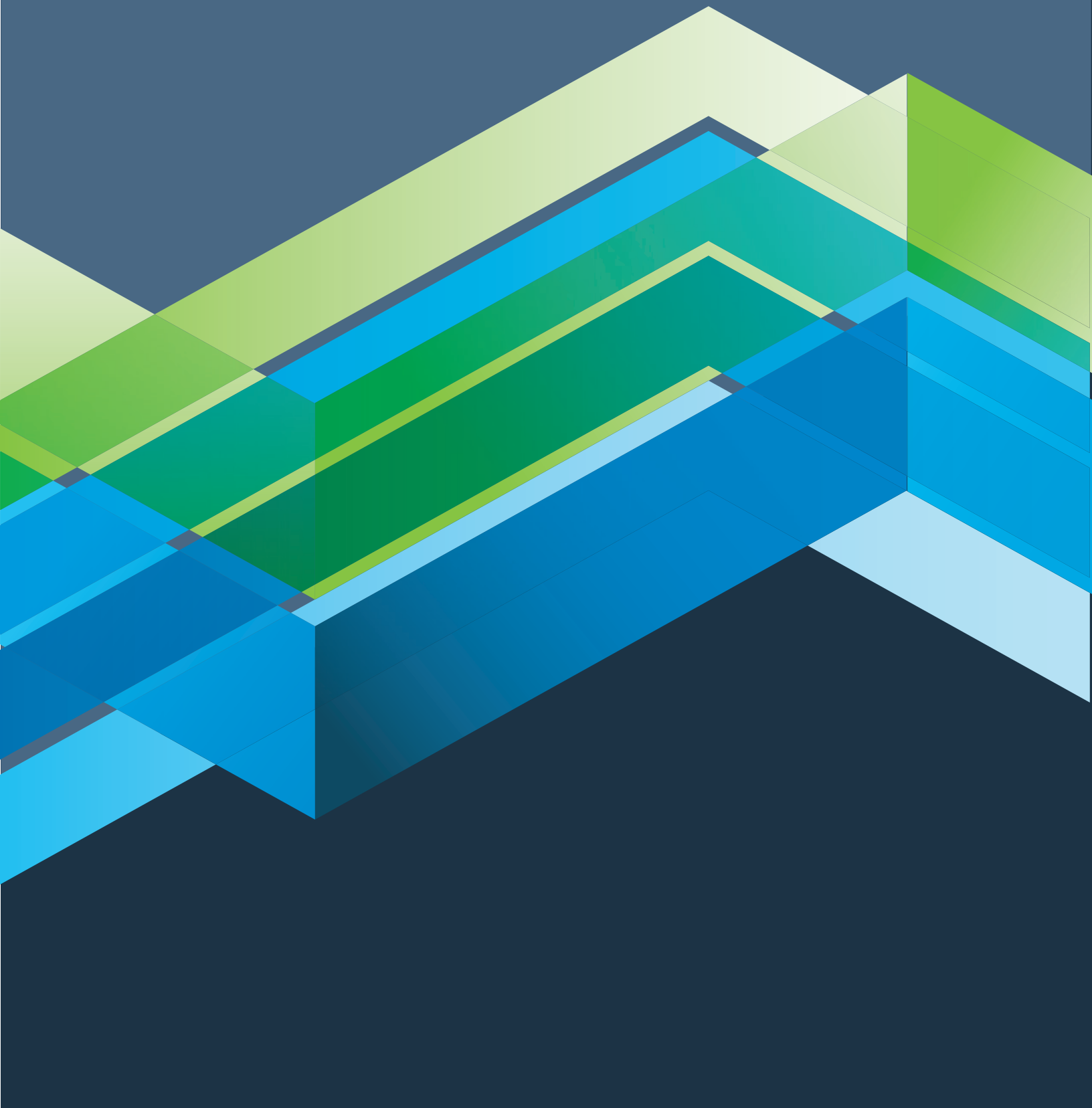
That's it.

That's how it's done.

Let's do it together.

©2021 Federation of Defense & Corporate Counsel

The Role of the CEO



The CEO is the heartbeat of a company. She is its soul, its spirit, its essence. There's something spiritual about her. She sets the company's moral compass, charts its course and directs its path. Weak CEOs make weak companies. Corrupt CEOs make corrupt companies. Resilient CEOs make resilient companies. Brave CEOs make brave companies. A company is an extension of the CEO. Think Jeff Bezos and Amazon. Mark Zuckerberg and Facebook. Elon Musk and Tesla. Jobs saved Apple. Iacocca saved Chrysler. Mulcahy saved Xerox. Lay killed Enron. Conway killed Kmart. Neumann buried WeWork. The disappearance of some of the biggest companies – Toys R Us, Woolworth, Pan Am, Arthur Anderson, Circuit City, Compaq and Washington Mutual – were not foregone conclusions. Companies teetering on the brink – Sears, JC Penny, AMC Theaters, Neiman Marcus – didn't have to walk up to the precipice. Top CEOs are thought leaders, industry changers and opinion makers. A CEO can make or break, resurrect or bury, grow or shrink, lead or misdirect a company. Learning how an effective CEO thinks, feels, communicates and leads her company can guide you to becoming the CEO of your life and defining, pursuing and achieving your purpose. Let's study how an effective CEO does her job so you can adopt those skills to your life.

How CEOs Succeed

A CEO succeeds by studying her company, learning its history, engaging its team, analyzing its strengths and weaknesses, defining its mission and purpose and devising a plan, with measurable goals and action steps, to be pursued wholeheartedly to fulfill its destiny. This process requires time and effort, imagination and thought, collaboration and leadership. CEOs begin by defining success for their company – by defining a win for their team. Then they work backwards. They start with the destination and devise a path to arrive there. It is a journey. It is a process. There are goals and a plan to achieve them. There are standards and protocols that direct the plan. There is data and analytics to measure progress. All of this comes back to an idea.

CEOs begin with an idea – an idea of the company's mission, an idea of its purpose, an idea of the endgame. The idea is the

©2021 Federation of Defense & Corporate Counsel

seed that cracks open, breaks through the ground, sprouts and grows beyond measure. CEOs succeed by thinking big and devising a plan to turn their ideas into reality.

You can emulate a CEO's success in your personal life. Treat your career and life just as a CEO treats her company. She drills down to the company's essence, discovers its purpose and creates a plan to achieve it. This process is creative and imaginative and spurs thoughts and ideas. You must start with the premise that you have a purpose. You may have already discovered it. Conversely, you may not have the foggiest idea what it is. You may even be resistant to thinking you have one. But you do. We all do. Each person has a purpose, just like every company, every association and every institution. The purpose goes by different names – the Mission, the Destiny, the Why. No matter the name, the rationale for you being on this planet is inside you waiting to be discovered and once you figure it out, you must pursue your purpose wholeheartedly.

Many of us are not motivated. Many of us lack inspiration. We start with the premise we need more motivation, more inspiration. We listen to motivational speakers, attend motivational seminars and spend hundreds, sometimes thousands, on motivational conferences and retreats. We don't need more external motivation. We need to define our purpose. Once we figure out our role in this crazy world, once we tap into our purpose, the motivation will burst forth like a geyser. You will succeed by isolating, identifying and nurturing your purpose. More on that later.

How CEOs Transform

CEOs transform by questioning everything. There are no sacred cows. There are no traditions or customs that are immune to change. The past is instructive but not determinative. Tradition and custom can guide but do not define the future. If a wrecking ball has to be swung, the foundation dug up and a company rebuilt from ground up, then so be it. A dentist scrapes away at a diseased tooth until he gets to healthy bone. Superficial decay may call for a filling. Deeper decay may call for a root canal. And if the tooth is irreparably damaged, it may have to be extracted. A CEO is a corporate dentist willing to extract every last tooth and implant a whole new set if need be. It's tough. It's painful. But it's necessary. An oncologist doesn't ignore cancer, hoping it will go away. She treats it, sometimes with radiation and chemotherapy, which not only poison and kill cancerous cells, but does the same to healthy ones. But if the treatments succeed, the cancer is vanquished and the patient

©2020 Federation of Defense & Corporate Counsel

lives and thrives and goes on with her life. Transformation is just that – complete and total – and the road to becoming something new, something successful, something powerful – is tough and challenging and requires sacrifice, dedication and discipline. CEOs transform because they are willing to make the hard decisions and do the hard work.

Your takeaway is that it's never too late to walk away from a job, a company or a career. It's never too late to turn the car around. You may realize you placed the ladder you've been climbing against the wrong wall. You may be living another's life, chasing another's dreams and pursuing another's goals. If so, we have a lot of work to do. Then again, the changes you need to implement may not be radical. The tumor may be benign. The decay may be superficial. Whatever you have to do, big or small, accept the change and embrace it. After an injury, rehab is necessary to beat back the scar tissue. Restoration comes with pain. It's not popular to talk about the pain and discomfort and discipline to transform oneself. If you want to become wholly you, completely you, gloriously you, count and embrace the cost to do so. It won't be easy, but if you do it, and come out the other side, you will achieve your purpose.

How CEOs Think

CEOs think differently. They think big picture. They think strategically. They think about solutions. They think about the end and work backwards. The CEO's paradigm, her prism through which she sees the world, is geared toward results, its focused on winning. Seeing things from the 30,000 foot level, seeing the forest, perceiving the entire ecosystem is what emboldens CEOs to think big, chart a course and achieve the objective. Jobs, Apple's CEO, thought simplicity. Bezos. Amazon's CEO, thought commerce at one's fingertips. Hastings, Netflix's CEO, thought of providing whatever entertainment you wanted, anywhere, anytime. There was an overarching theme, a story to tell, a goal to achieve, and that meta approach directed and drove them. Trial lawyers win verdicts by choosing a theme and funneling their client's story through that theme to convince the jury to find in their favor. CEOs win by picking a theme and funneling their company's story through that theme to sell more products or services, increase market share and become a leader in their industry. Details are important, no doubt. But big picture thinking precedes and directs the relevant details.

For your sake, you need a paradigm shift. The way you approach your career, your life, your problems and concerns, your hopes

©2020 Federation of Defense & Corporate Counsel

and dreams has to change. Let's take your career. Think big picture. Where do you see yourself at its conclusion? Think big goals. If you could achieve anything, what would it be? Think purpose. What aspect of your career are you most passionate about? Each of us can be mired in the day to day affairs and emergencies. We get home, we click on the television, eat dinner, fall asleep, and do it again the following day. Wash, rinse, repeat. It takes time and energy to step back and see the pig picture and pursue it. If you want to achieve your purpose, you'll need to develop the discipline to do just that.

How CEOs Lead

CEOs lead out front. They create and birth a vision, secure buy in, and lead the team to chase, embrace and bring it to fruition. Leading is big picture. It's broad strokes. Leading is not about details, or the weeds or the trees. They order the team to take the hill, and the team takes the hill. Starting with the end in mind. Taking the king. Winning. They are the architects. The master planners. They see the finished product, the endzone, the finish line, and work backwards to get their team there.

How CEOs Motivate

A plan is ineffective if no one rolls up their sleeves and does the hard work. So often, organizations invest in a third party or consultant to come in, help them create a strategic plan, and it sits on the shelf, collecting dust. That's because the initial excitement and enthusiasm has waned, and the team, including the leadership, has lost the incentive and motivation to pursue it, enact and bring it to fruition. CEOs, aware of waning energy, motivate their team until their goals are achieved. They understand that different individuals have different motivators, so they first get to know their team, learn what motivates them, and target what motivates their team throughout the process of pursuing and achieving goals.

©2021 Federation of Defense & Corporate Counsel

How CEOs Inspire

Inspiration and motivation are different, though they're often confused. Inspiration is the spark that starts the fire. Motivation is the accelerant that turns the fire into a conflagration. The inspiration is the starter pistol that shoots you off the blocks. The motivation keeps you running. Inspiration is big picture. It's lofty. It's what makes you try to grab the stars and pushes you to reach beyond your grasp. Some of the best CEOs, certainly the most memorable ones, are those who inspire their team. Think Musk reaching for Mars. Think Bezos bringing everything to everyone. Sharing a vision that transforms the world, transforms the team, transforms others - is inspiration. CEOs are poets and thought leaders. They are visionaries, explorers and adventurers. They see more, and equip others to see more too.

How CEOs Plan

CEOs understand the importance of well conceived, well formulated, well reasoned plans. They assess their companies, question their teams, study the market and their competitors, define their company's why and what, evaluate the threats and opportunities, strengths and weaknesses, what works and what doesn't, and create a long term plan with specific, concrete goals broken down into tangible, measurable, obtainable tasks, and hold their team accountable to enact the plan. Whether CEOs use the term or not, they, in effect, engage in strategic planning.

©2021 Federation of Defense & Corporate Counsel

How CEOs Set Goals

CEOs think big picture and they set big goals. They toggle between all encompassing, powerful, large goals and goals that are measureable, achievable and can be reduced to actual action steps that can be performed, evaluated and modified as needed. There is this tension between going big and being realistic. Between being revolutionary and fighting smaller fights. Anyone can set huge goals – become an industry leader, increase profits by 100%, take over new markets – but the best CEOs know how far to reach and how far their teams can go. CEOS know their teams, know their companies, know their talent, know their resources, know their competitors and know their markets and based upon this set goals that are appropriate for and work for their companies.

How CEOs Achieve Goals

CEOs start with goals that push their teams but yet are obtainable. Once they define goals, they reduce those goals to tasks. Tasks are realistic, measurable, calculable and determinable. The process between moving from inspiration to defining action steps involve a series of steps that transition from the general to the specific, from the lofty to the practical. Inspiration is big picture. The step from inspiration to setting goals is one where you move from the abstract to concrete. You create goals for your team to achieve your vision. You then take the step from setting goals to defining action steps, where you reduce each goal to a series of tasks that are specific, measurable and doable. You then study the action steps and measure whether they are being accomplished and whether, as anticipated, they lead to the achievement of the proposed goals. Think of it as a funnel – from general to specific – from big picture to brass tacks. CEOs may not know each action step that must be taken to achieve their grand vision but they drive their team to determine what those are and develop a plan to ensure those action steps are taken, are measured and that each person knows what tasks they are performing and are held accountable to perform them.

©2021 Federation of Defense & Corporate Counsel

How CEOs Manage

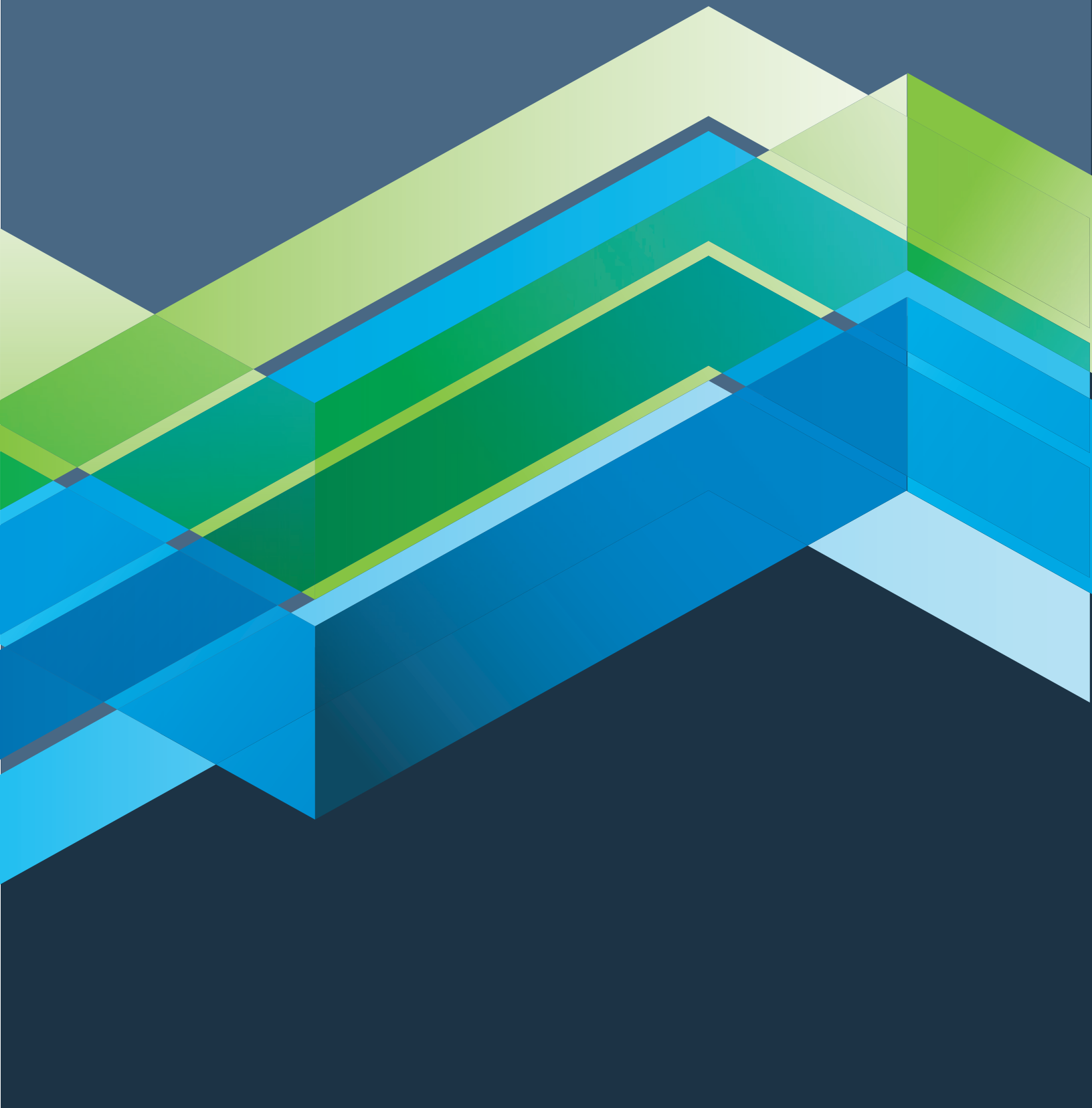
CEOs know that management is made easy with an effective, well thought out, well conceived plan. Once CEOs have created a plan, with specific action steps, assigning each team member one or more action steps, and creating a system to measure whether those action steps are being performed properly and if so, whether they help achieve the goals, and an accountability system is created to ensure everyone is doing their part and fulfilling their assigned roles, then management is the least of it. CEOs often can assign managerial duties to those beneath them because everyone knows the vision and mission, everyone knows the goals and action steps, everyone knows their role and their responsibilities, and what is in place is akin to a paint by number program where managing a team should be easy, routine and non-controversial.

How CEOs Improvise

Improvisation is a crucial talent the best CEOs have in their quiver. They appreciate surprises happen all the time. Emergencies are a common occurrence. The unexpected is to be expected. So CEOs think several steps ahead, with one or more steps being unexpected ones, and they are generally prepared for what others are not, and foresee scenarios others don't. Improvisation is drawing from one's skills and knowledge, one's planning and processes, and reacting to a situation that wasn't part of the plan. Good CEOs are rarely surprised because they anticipate surprises and react appropriately to them.

©2021 Federation of Defense & Corporate Counsel

Corporate Strategic Planning



Before we jump into personal strategic planning, let's discuss corporate strategic planning. Because by learning how companies plan strategically, you can learn how to plan strategically in your own life. Learn how others plan in business and you'll learn how to plan in your personal matters. The following process is simple, direct, and easy to follow.

Why Do Companies Prepare Strategic Plans?

Companies prepare strategic plans because they work. Companies need direction. They need a mission and a roadmap to achieve it. Companies that engage in strategic planning are generally more successful than ones that don't. Companies that fail can often trace their failure back to a lack of planning. Their shortcomings are often due to a shotgun approach with little fore thought. Rushing without planning, acting without planning, proceeding without planning, may result in action but seldom action with purpose. Strategic planning - a vision, a plan to achieve it and action steps to achieve the goals – works. It leads to wins. It results in success.

What's in a Corporate Strategic Plan?

The content of a strategic plan varies depending on the purpose of the plan. Some strategic plans start from scratch. They are holistic. They cover the waterfront. These are broad plans. They are big plans. These strategic plans start with the foundation. They question every assumption and every data point. They start with questioning the company's purpose – the why. Why does it exist? Why should it continue to exist? And from there, the plan defines the what and the how. These plans are like architectural plans for a skyscraper. They cover everything from the foundation to the top spire. And then there are strategic plans that are smaller in scope. A company has already undergone

©2021 Federation of Defense & Corporate Counsel

an overhaul, and just needs some touching up, some cosmetic alterations.

Planning starts with deciding the scope of the plan and that dictates the goals, which in turn dictate the action steps and so on. For purposes of the following discussions, we will assume this is the first strategic plan a company is undertaking and we are starting from scratch. We need to start with the company's purpose – its mission and vision – start at the top of the funnel – the big picture – and then proceed down the funnel - setting short, intermediate and long term goals, defining action steps to achieve them, assigning team members to each action step and creating accountability to ensure they are completed.

Purpose of Strategic Plans

Most companies pursue strategic planning to assertthemselves in the marketplace and increase profits and reduce costs. Money drives the plan. How can the company make more money? How can it increase revenue? How can it increase profits? How can it sell more? Expand its market share? Evaluating how to increase income stream invariably leads to how better to serve clients. If clients aren't happy, aren't satisfied, their needs aren't meant, they aren't sticking around. They won't buy the product or service. They're not going to recommend a product or service to friends and colleagues. And so the discussion moves from money to clients – how to serve them better and better meet their needs. How to grab and keep their attention. How to get them to buy, keep buying and remain loyal. And then the discussion shifts from clients to the product or service sold, and how to improve it and market it better. And of course, all of this circles back to the original conversation – money. At the end of the day, CEOs create strategic plans to make more money.

©2021 Federation of Defense & Corporate Counsel

Developing Strategic Plans

Developing a strategic plan is a long, detailed process. First, a company must secure all the relevant information and data. It must interview, survey and question its key players about the company's baseline. It must research its market, its clients and its competitors. In short, a company gathers all the relevant information to make informed decisions about its strategic plan.

Once a company has gathered all the information, it discusses its purpose. The discussion – why the company exists – why it should exist – its reason for being – is the most important and crucial part of the discussion. These discussions generally center around a company's mission, vision, values and principles. These need to be defined and refined. Discussed and analyzed. Reduced to writing and edited and edited some more until the consensus is reached. This is the foundation of the plan and every plan needs a strong foundation.

From there, the strategic planning team decides upon short, medium and long term goals, defines action steps for each, assigns team members to complete each, defines how success and advancement of the plan will be measured and creates an accountability mechanism to hold everyone's feet to the fire.

As you can see, strategic planning is really just planning. It's not much different than a plan you would create for improving your health, writing a book or any major task you want to undertake. Simply choosing to plan, as opposed to bypassing it as many do, puts one ahead of the game.

Implementing Strategic Plans

Implementation of the plan is as important if not more so than its creation. So often plans are created and then shelved and never looked at again. They become a novelty, something that demanded a lot of time and effort but was never used nor relied upon. Failure to implement contributes to the illusion that strategic planning doesn't work. But the problem wasn't the process. The problem was that the process was never completed. After the strategic plan is drafted, a process must be agreed upon to ensure it is enacted. Each task in the plan must be assigned to a team member. Deadlines must be set for each task. Regular reporting and meetings must be had to ensure everyone is doing their jobs and doing them well. It's no different than coming up with an exercise plan and not exercising. The plan is important, but the execution is key. That's where the rubber meets the road.

©2021 Federation of Defense & Corporate Counsel

The Mission

A company's mission is its purpose. It is, as Sinek says, its "Why." What is a company's purpose and destiny? This is a foundational question a company must ask itself before charting its course into the future. If a company already has a mission statement, when was it last reviewed and updated?

The best approach to creating a mission statement is to compile a list of key words that describe a company and its team. Then, arrange the words into aspirational sentences. Then edit the draft into an agreed statement.

Mission and vision statements are the first items a company tackles when preparing a strategic plan. One cannot move forward as an organization without a strategic plan, and one cannot develop a strategic plan without first defining the mission of a company.

The Vision

A company's vision is how it achieves its purpose. Where is it headed? A company's vision is driven by its mission. If the mission is the why, the vision is the how, what and where. The vision is the first step to defining the meta goals for a company. It is through exploring a company's vision, that its goals start taking shape.

The Values

A company must define its core values. These will guide it as it pursues its purpose, mission and vision. A company's values are its moral compass. They ensure a company pursues its goals in an ethical and proper manner. They guide in all facets and aspects of decision making. A company without values is like a boat without a rudder. When the waves come crashing, it will veer to the left or right, wherever the currents take it.

©2021 Federation of Defense & Corporate Counsel

First Principals

First principles are a step removed from values. Values are beliefs. First principles are rules. We all have first principles we live by as do companies. As with values, a company must define its first principles because they are the rules they and their team will follow when executing the strategic plan.

Brainstorming

Planning requires creativity, imagination and plenty of ideas. Great ideas can come from anywhere and from anyone. Therefore, many companies solicit ideas from their team. They have brainstorming meetings where their teams discuss ideas, goals and how to achieve them. Sometimes the best ideas come from unexpected places. Encouraging and facilitating an environment where teams can think out loud, share ideas, hold them up to the light, have them undergo vigorous debate and see which ones have legs benefits everyone. Great companies incorporate brainstorming into their strategic planning.

The Plan

Once the foundation has been laid and ideas discussed, companies craft a strategic plan. They define long term success, sometimes 5 years out, sometimes 10, sometimes more. They start with the end game and work backwards and forwards to determine how best to get to the finish line.

©2021 Federation of Defense & Corporate Counsel

Goals

Companies spell out the short, intermediate and long term goals that are consistent with their values and first principles, that achieve their vision and fulfill their mission.

Action Steps

Companies take each goal, break it down to a series of tasks or action steps, and assigns each action step to an individual or team to complete it timely and properly. This step – converting goals into actual doable tasks – is one of the most crucial steps in strategic planning. So often, goals are lofty, abstract and nebulous, and become difficult to translate into an action plan. That's why companies try to start with concrete goals. But even more important, they must reduce those concrete goals into a series of action steps that are realistic, doable and measurable. It is these action steps that will be measured, assessed and reported.

Timetable

Once a company has defined its goals, and the individual tasks, that when performed, will achieve the goals, it sets deadlines for each task and conducts regular reporting and meetings to ensure these deadlines are met.

©2021 Federation of Defense & Corporate Counsel

Improvise

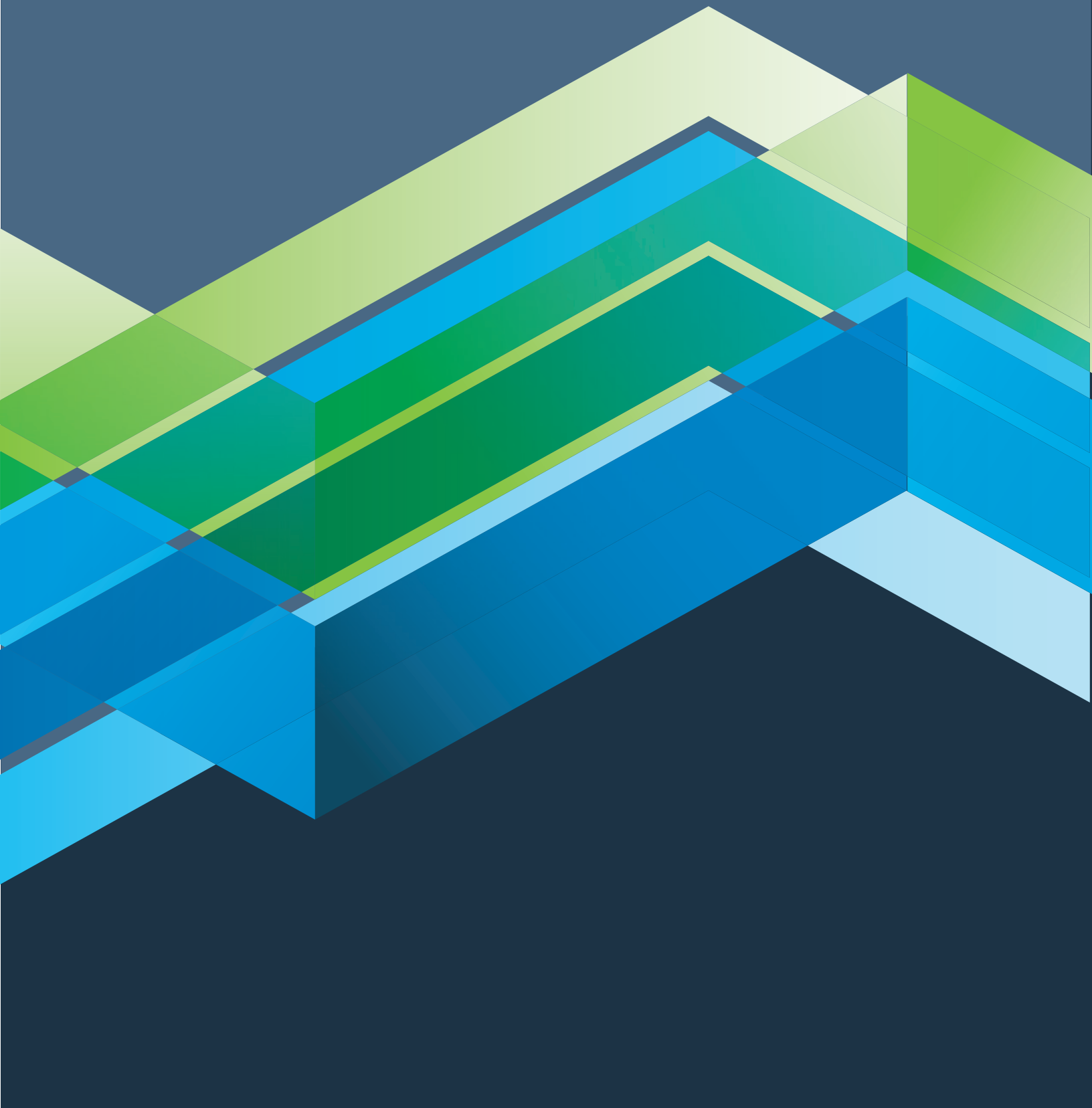
Companies understand surprises happen. Emergencies happen. The best laid plans often go astray. Companies understand and encourage improvisation to make changes to the strategic plan as needed.

Accountability

And lastly, when it comes to strategic planning, companies decide how best to hold their teams accountable to ensure that the plan is enacted properly and on a timely basis. A system of regular and consistent reporting, with regular meetings where team members are held accountable for their successes and failures, ensures everyone is doing their best to achieve their individual objectives, which collectively, produce the results necessary to achieve all the goals of the overall plan.

©2021 Federation of Defense & Corporate Counsel

Personal Strategic Planning



This section will teach you how to prepare a personal strategic plan, using many of the same techniques, approaches and steps companies use to create their corporate strategic plan. You will learn the process isn't difficult. It simply requires introspection, thought and time.

Why Prepare a Personal Strategic Plan?

If you're struggling to achieve your dreams, or perhaps you're struggling to even define them, then strategic planning will help you define where you want to go and how to get there. If you've read any self help books or listened to any self help speakers, what they all share in common is that they all say that you need a plan. Without a plan, who knows what you're chasing or what you're trying to accomplish. Without a plan, you may hit a target but you won't know if you hit the right one. So strategic planning will help you define your purpose and help you achieve it.

What Can You Learn from Corporate Strategic Plans?

I started this book discussing corporate strategic planning and titled it Become Your Own CEO, because how companies develop and benefit from strategic plans translates into how you can develop and benefit from strategic plans. There is no secret formula or magic bullet when it comes to strategic planning. You decide what you want to do, create a plan to do it and then you do it. Companies do it all the time and you can too.

©2021 Federation of Defense & Corporate Counsel

Brainstorming Your Strategic Plan

Before you sit down to write your strategic plan, you want to brainstorm what you hope to accomplish. A good start is to answer the questions in the personal survey section below, which covers every aspect of preparation and drafting of the strategic plan. If you spend time reflecting upon and answering the questions in the surveys, you will have what you need to write out your strategic plan. The questions cover the water front and challenge you to analyze what you want from life and your career and what to do to achieve your goals and dreams.

Journaling

I recommend you purchase a journal, if you prefer writing by hand, or create a document on your computer, if you prefer typing, and write your thoughts, ideas and reflections about your life, your dreams, passions and goals. Part of the personal strategic planning process is to confront yourself, your perceptions, your fears, your notions, your imagination, your beliefs – look at all of you – the good, the bad and the ugly - and assess where you've come from, who you are and where you're going. An honest and thorough self assessment will help you pursue and achieve the right goals for you.

©2021 Federation of Defense & Corporate Counsel

Personal Survey

Please take the following personal survey:

- What do you enjoy most about your career?
- What do you enjoy least about your career?
- Have you ever considered another career? What career? Why?
- What do you do best at your job?
- What do you struggle with at your job?
- What do others say you do well at your job?
- What have others said you don't do well at your job?
- As a child, what did you want to be when you grew up?
- In high school, what career did you want to pursue?
- In college, what career did you want to pursue?
- Have you ever taken an assessment to evaluate your personality, strengths, skills, etc? If so, what were the big takeaways from the results?
- What books have you read about leadership, management, sales or self help? Why did you read them? What did you learn from them?
- What seminars, classes, webinars or presentations have you attended addressing leadership, management, sales or self help? Why did you attend them? What did you learn from them?
- What are your talents? Your strengths? Your weaknesses?

©2021 Federation of Defense & Corporate Counsel

- What have others told you are your talents? Your strengths? Your weaknesses?
- What are you passionate about? What do you daydream about? What keeps you up at night?
- What are your dreams for your career? For your life? What were they in high school? College? Graduate school? How have they changed? Why have they changed?
- What are your fears? What roadblocks do you create for yourself? What is holding you back from accomplishing your goals?
- What are your short, intermediate and long term goals? How do you decide upon these goals? What have you done to accomplish them? What is holding you back from accomplishing them?
- Do you keep a journal? Have you ever? What do you use it for?
- What is your decision making process for decisions about your career? Family? Life?
- How often do you reflect on the past? What do you focus on? How often do you reflect upon the future? What do you focus on?
- Have you ever engaged in strategic planning for your company, firm or association? If so, what was your role? Did you find the process productive?
- If you decide to pursue personal strategic planning, what benefits are you hoping to receive from the process?

These questions will provide you relevant background information about who you are, where you've come from and where you want to go.

©2021 Federation of Defense & Corporate Counsel

Personal Strategic Plan

After you've answered the personal survey questions and have reflected upon your answers, it's time to start thinking through your personal strategic plan and reduce it to writing. The following is a summary of that process:

- **Your Talents** Write down all your talents.
- **Your Passions** Write down your passions.
- **Your Dreams** Write down your dreams.
- **Your Mission** Write down your personal mission statement.
- **Your Vision** Write down your personal vision statement.
- **Your Values** Write down your personal values that you live by.
- **Your First Principles** Write down your personal first principles that you live by.
- **Your Purpose** Evaluate where your talents, passions and dreams intersect through the prism of your mission, vision, values and first principles. Where these intersect is where you find your purpose.
- **Your Destiny** Write down your obituary at the end of a long and productive life.
- **Your Goals** Write down your short, mid range and long term goals.
- **Your Plan** Organize your goals and write an action plan for each goal.
- **Your Action Steps** Write out the action steps, small and large, for each goal.
- **Your Timing** Write out the timing to achieve each goals.
- **Your Deadlines** Write out the deadlines to achieve the goals and each of the action steps that comprise each goal.

©2021 Federation of Defense & Corporate Counsel

Personal Strategic Forms

The following are forms you can use to write your strategic plan. The forms are followed by descriptions of the issues outlined in each form to assist you to make the most of these forms. The key to strategic planning can be reduced to four steps:

- Define the objective
- Define the goals needed to achieve the objective
- Define the action steps needed to achieve the goals
- Perform the action steps in a timely manner

These forms below help you through these four steps.

Your Talents

- What are you talents?
- What are your skills?
- What comes easy for you?
- What do you do better than others?
- What are you known for?
- What are you praised for?
- What do you focus your time on?
- What talents do you focus on?

©2021 Federation of Defense & Corporate Counsel

- What talents have you developed?
- What talents have helped you in your career?
- What talents have helped you in your relationships?
- What talents have helped you make decisions?
- What talents alleviate your concerns and fears?
- What talents do you believe you will be remembered for?
- What talents did you have when you were younger?
- What additional talents have you developed during your life?

Your Passions

- What are your passions?
- What are you passionate about?
- What do you spend your free time doing?
- What do you spend your free time reading?
- What are your hobbies?
- What are your distractions?
- What do you enjoy talking about?
- What are your favorite topics of conversation?

©2021 Federation of Defense & Corporate Counsel

- What were you passionate about when you were younger?
- Have your passions changed?
- What organizations have you belonged to? Why?
- Where do you like to vacation?
- What do you enjoy doing while vacationing?
- If your family, friends and colleagues were asked, what would they say you were passionate about?
- Are you active on social media? If so, what do you generally post about?
- Do you write or speak? If so, what do you write or speak about?
- What keeps you up at night? What wakes you up in the middle of the night? What gets you out of bed in the morning?
- What do you want to be remembered for?
- What do you want your legacy be?

©2021 Federation of Defense & Corporate Counsel

Your Dreams

- What are your dreams?
- What are your dreams for your career?
- What are your dreams for your family?
- What are your other dreams?
- What were your dreams when you were younger?
- How have your dreams changed?
- Have you ever written down your dreams? When? What did you write down?
- Have you done anything to achieve your dreams? What have you done?
- Have you ever discussed your dreams with others? With whom? What did you discuss?
- How real do your dreams feel to you? Why?
- Do you believe your can achieve your dreams? Why or why not?
- What obstacles stand between you and your dreams?
- What can you do to achieve your dreams?
- What skills do you need to achieve your dreams?
- What resources do you need to achieve your dream?
- How much time do you think you need to achieve your dreams?

©2021 Federation of Defense & Corporate Counsel

Your Mission

- What is your personal mission?
- What is your mission for your career?
- What is your mission for your family?
- What is your mission for your company or firm?
- What is your mission for your community?
- What is your personal mission statement?
- What goals do you want to include in your personal mission statement?
- What action verbs do you want to include in your personal mission statement?
- What nouns do you want to include in your personal mission statement?
- Are there any corporate or personal mission statements you've read that you believe apply to you? Which ones? What about them resonate with you?
- Do a search for "mission statements" on Google and review some of companies, firms and non profits. Write down those that resonate with you.
- Draft a personal mission statement. Revise it until it is as direct, simple and succinct as you can make it.

©2021 Federation of Defense & Corporate Counsel

Your Vision

- What is your personal vision?
- What is your vision for your career?
- What is your vision for your family?
- What is your vision for your company or firm?
- What is your vision for your community?
- What is your personal vision statement?
- What goals do you want to include in your personal vision statement?
- What action verbs do you want to include in your personal vision statement?
- What nouns do you want to include in your personal vision statement?
- Are there any corporate or personal vision statements you've read that you believe apply to you? Which ones? What about them resonate with you?

Do a search for "vision statements" on Google and review some of companies, firms and non profits. Write down those that resonate with you.

Draft a personal vision statement. Revise it until it is as direct, simple and succinct as you can make it.

©2021 Federation of Defense & Corporate Counsel

Your Values

- What values did your family instill in you?
- What values did school instill in you?
- What values did your house of worship, faith or religion instill in you?
- What values did your experiences teach you?
- What values did your employers instill in you?
- What experiences have instilled values in you? What were they?
- What were your values when you were you younger? Have they changed? How? Why?
- Write down all your values. After you write them down, organize them in order of importance to you.
- Do values play a role in your decision making process? How?
- When have your values played a role in your decision making process? How did they affect your decisions?
- How has your value system changed over the years? To what do you attribute the changes?
- Have you acquired any of your values from books? Which books? Which values?
- Have you acquired your values from observing others? Who did you observe? What values did you learn from them?
- Have you ever abandoned a value? Which one? Why?
- How have your values served you in your life?

©2021 Federation of Defense & Corporate Counsel

Your First Principles

- What principles (rules) do you live by?
- Write down all your principles and organize them in order of importance to you.
- How do your principles affect your decision making?
- What is the origin or source of your principles?
- How did you learn your principles?
- From whom did you learn most of your principles? Why?
- What is the relationship between your values, which are the standards that govern your behavior, and your principles, which are the rules that govern your behavior? Your values direct your principles.
- Compare the values you wrote down and the principles you wrote down and evaluate the relationships between them.
- How have your principles changed over your lifetime?

©2021 Federation of Defense & Corporate Counsel

Your Purpose

Your purpose can be defined where your talents, passions and dreams intersect. With that definition, where do you see your talents, passions and dreams intersecting?

- Where is there common ground or overlap among your talents, passions and dreams?
- What do you consider your purpose to be?
- Have you ever written down your purpose? When? What was it?
- Have you ever thought about what big things you wanted to do or accomplish? What were they?
- What do you think your family, friends and colleagues would say your purpose is?
- If you could reduce your purpose to a sentence, what would it be?

Your Destiny

- How do you want to be remembered?
- What do you want your legacy to be?
- How do you want your obituary to read?
- How do you want your family, friends and colleagues to remember you?
- What do you want to do or to accomplish that you will be remembered for?
- If you could be remembered for centuries, what would you want to be remembered for?

©2021 Federation of Defense & Corporate Counsel

Your Goals

What are your short, medium and long term goals for:

- Your career
- Your family
- Your health
- Your company or firm
- Your trade or bar associations
- Your Community

Your Plan

For each goal write out:

- The action steps to achieve the goal
- The order of the action steps
- Detailed description of each action step
- What resources you need to achieve the action steps
- How much time you need to achieve the action steps
- What assistance you need to achieve the action steps
- What expertise or advice you need to achieve the action steps
- What deadlines you want to set for yourself for the action steps

©2021 Federation of Defense & Corporate Counsel

Your Action Steps

For each action step:

- Define it in detail
- Determine what you need to complete it
- Spell out how to complete it
- Ensure that the action steps are concrete, doable and measurable
- Define a timeline by which to complete it

Your Timing

- What is your timetable for your strategic plan?
- What order do you need to perform individual tasks and achieve individual goals?
- What do you want to accomplish short, medium and long term?
- How much time do you plan on dedicating to your plan on a daily, weekly, monthly and yearly basis?
- How much progress do you hope to achieve on a weekly, monthly and yearly basis?
- When do you plan on completing your strategic plan?
- What timeline or range of time do you think you need to achieve your various goals?

©2021 Federation of Defense & Corporate Counsel

Your Deadlines

For each goal:

- Set a deadline
- Create a calendaring system that lists your deadlines and reminds you of them
- Get an accountability partner and meet with them monthly to review your progress
- What timeline or range of time do you think you need to achieve your various goals?

Your Talents

Your talents drive your plan. Each of us is good at something. Some of us are good at several things. A few of us are good at many things. Determine what you are good at – what your talents and skills are. It is not a coincidence you are good at something. Each of us has a purpose and that purpose is achieved through our talents and skills. So to achieve your purpose you must evaluate what your skills are, all of them, big and small, common and unique, and write them down.

Your Passions

Your passions are your fuel – they get you up early in the morning, keep you working into the night and toiling through the weekend. Your passions motivate you to chase and achieve your goals. If you're pursuing a goal for which you have no passion, the odds of you achieving it are much lower than if you are pursuing a goal for which you have passion. I believe our passions are interwoven into our DNA, into our hearts and into our souls, so that from birth we are driven to pursue them, and by extension, pursue our purpose. Align your goals with your passions, because your passions will inspire and motivate you to achieve them.

©2021 Federation of Defense & Corporate Counsel

Your Dreams

We all have dreams. Many of us abandoned them years, if not decades, ago. Your dreams are part of you. They define you. They are your lodestar to direct your life. There is a reason we have dreams. They do not occur by happenstance. They are not merely a flight of our imaginations. They are innate in us and they are there to provide form and shape to our purpose. Listen to and write down your dreams. They will define your goals.

Your Mission

Companies have mission statements. Non profits have them. Trade associations and voluntary bar associations have them. Firms have them. Most everyone has them because they're crucial in identifying the "why" or the purpose of an organization. Take the time to write down, in a simple, straight forward and direct manner what your mission is, and try to reduce it to a single sentence. Write it on a business card or post it and keep it near you to always remind you what your purpose is.

Your Vision

If your mission statement is your "why," then your vision statement is "how" you achieve your "why." As with your mission statement, reduce your vision statement to a sentence (perhaps two) describing your "how."

Your Values

Your values establish the standards by which you live your life, which directs what goals you set for yourself and how you will pursue them. Write out your core values because they will create the lane in which you drive your plan.

©2021 Federation of Defense & Corporate Counsel

Your First Principles

Your first principles are based on your values and are the rules by which you live your life. Write them down, because they, along with your values, set parameters on your behavior and what plans you pursue and how you pursue them.

Your Purpose

Your purpose, your why, your reason for existing, can be found where your talents, your passions and your dreams intersect. Seek and search out that point of intersection. Think through how they come together, meld, and bolster each other, and write down what they show you about your purpose.

Your Destiny

Your destiny is akin to your purpose, but a tad different. Your destiny is what you will become. What you will be remembered for. It's your legacy. In a manner of speaking, it's your way of living eternally after you die, because it's what you leave behind. Think through how you want to be remembered and what impact you want to have made and write it down.

Your Goals

Your goals have two aspects. First there is the type of goal. We have career goals. Family goals. Health goals. Other goals. And then there is the size and timing of our goals. There are modest, short term goals. There are larger, mid range goals. And then there are overarching long term goals. Write down all your short, medium and long term goals for your career, your family, your health, your company or firm and any other goals you have in mind.

©2021 Federation of Defense & Corporate Counsel

Your Plan

Goals without a plan to achieve them are nothing more than unfulfilled dreams. Devise a step by step plan on how to achieve each of your goals. Consider what skills, training and resources you need to achieve your goals, what you need to do to secure these skills, training and resources, what steps you need to perform to achieve them, what order you want to pursue them, and a timetable to accomplish them.

Your Action Steps

Each goal – whether short, intermediate or long term – whether career, family, health or other – must be broken down into a series of achievable, measurable, definable, objective action steps that you can perform and complete to ensure that your abstract goals are reduced to concrete tasks you can perform and you can measure to determine if doing them results in achieving your goals. If they don't, the action steps need to be modified and adjusted accordingly.

Your Timing

It's important to create a schedule for yourself to complete your tasks and achieve your goals. Without any time limits or a calendar with due dates and deadlines, you likely will procrastinate and continually put off accomplishing your goals. Get either a physical or virtual calendar and write out the dates by which you plan on completing each task and achieving each goal.

Your Deadlines

Deadlines keep us focused. After you have created a calendar of everything you want to do and when you want to do it to achieve your goals and fulfill your plan, create a memo or chart with all your deadlines and keep it close by. This will help keep your eye on the prize and drive you to work consistently toward your goals.

©2021 Federation of Defense & Corporate Counsel

Your Written Strategic Plan

You written strategic plan should look like this:

My talents

1.

2.

3.

4.

5.

My passions

1.

2.

3.

4.

5.

My dreams

1.

2.

3.

4.

5.

My purpose is

©2021 Federation of Defense & Corporate Counsel

My destiny is

My mission statement is

My visions statement is

My values

1.

2.

3.

4.

5.

My first principles

1.

2.

3.

4.

5.

My short term goals

1.

2.

3.

4.

5.

©2021 Federation of Defense & Corporate Counsel

My intermediate goals

1.

2.

3.

4.

5.

My long terms goals:

1.

2.

3.

4.

5.

My action steps for my short term goals:

1.

2.

3.

4.

5.

My action steps for my intermediate goals:

1.

2.

3.

4.

5.

©2021 Federation of Defense & Corporate Counsel

My action steps for my long term goals:

1.

2.

3.

4.

5.

My deadlines for my short terms goals:

1.

2.

3.

4.

5.

My deadlines for my intermediate goals:

1.

2.

3.

4.

5.

My deadlines for my long terms goals:

1.

2.

3.

4.

5.

©2021 Federation of Defense & Corporate Counsel

My accountability partner is:

We will meet on the following dates to discuss my plan:

1.

2.

3.

4.

5.

I will measure success by:

I will change my action steps if the following happens:

I will change my goals if the following happens:

Holding Yourself Accountable

A plan only works if you follow through with it. An idea is not enough. Goals are not enough. A plan is not enough. You need to do the hard work. You need to sacrifice. You need to set time aside. You need to do the daily grind. And to do all this, you need to hold yourself accountable. Evaluate your progress weekly. Secure an accountability partner – a family member or friend – with whom you meet regularly that will hold your feet to the fire and won't give you a pass. You may even consider hiring a life coach. But whatever you do, create an accountability system that keeps you focused, on track and moving toward your goals, each and every month, week and day.

©2021 Federation of Defense & Corporate Counsel

Evolving a Plan

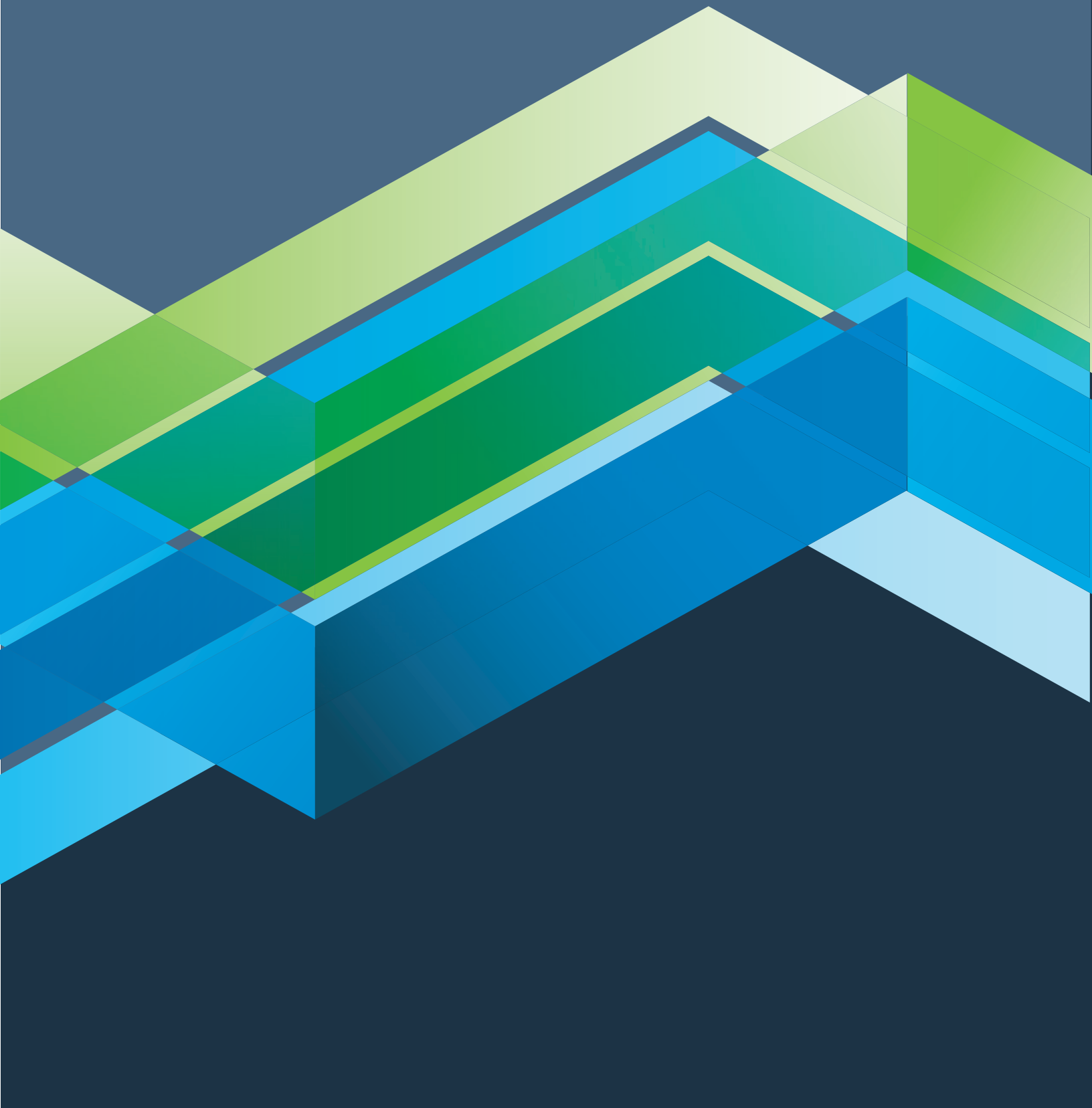
Your interview is your opportunity to shine. If a firm grants you an interview, it is interested in you. Don't forget or overlook that. Attorney time is precious and a firm wouldn't invite you in for an interview unless they were serious about you as a candidate. So when preparing for an interview, and when getting your nerves and fears in check, keep in mind that the reason you are stepping off the elevator into the lobby and informing the receptionist you're there for an interview is because the firm is interested in you. They're not taking pity on you. They're not doing you a favor. They're not killing time. They are interested in you. Don't forget that and use that to fuel your confidence, which is crucial to have a positive and effective interview.

Improvisation

Improvisation isn't limited to jazz and comedy. As you implement your plan, expect the unexpected and be prepared to improvise to continue your forward progress. Consider your plan a guideline which directs your path but along the way you may have to take a different path or a detour or even retrace your steps. This is bound to happen even with the best laid plans. Understand that improvisation is needed and often necessary to achieve your goals and complete your strategic plan.

©2021 Federation of Defense & Corporate Counsel

Beyond Personal Strategic Planning



The process of strategic planning applies equally to one's personal life as to any entity or group to which one belongs. Everything we do we can do better through strategic planning. Starting with a goal, developing a plan to achieve it and executing the plan – this process – applies to everything we do and pursue. Create a plan, work the plan. Create a plan, work the plan. This tried and true process works. It has always worked. It will always work. Learning the process and applying it at your job, your firm, your company and beyond can change everything around you and everything you touch for the better. Strategic planning applies to everything and improves everything.

Prepare a Strategic Plan for Your Company or Firm

Initiate strategic planning at your company or firm. Secure the buy in from the leadership and the team and facilitate the creation and implementation of a strategic plan. How does a company or firm engage in strategic planning?

- Assess current status. Survey the leadership and team to determine the current status of your company or firm. Ask what its strengths and weaknesses are. Ask what its opportunities and threats are. Ask what it does well and what it does poorly. Ask about its successes and failures. Ask about its history and its trajectory. To improve, to change, to transform – you must start by understanding the baseline.
- Assess identity. Discuss the company's or firm's mission, vision, values, principles and purpose. Review how these have changed and why.
- Assess role. Define the company's or firm's ideal client, space in the marketplace, its competitors and its selling proposition.
- Define future. Review and analyze how the leadership and the team has defined the company's or firm's current status, identity and role and based on this input and analysis, define its future. What is the future of your company or firm? What are its meta goals? What are its aspirations? How does it want to be defined? What will its brand be? What will its footprint in the marketplace be? Where will it be in 10 years? 20? 30? What is its trajectory?

©2021 Federation of Defense & Corporate Counsel

- **Define goals.** Based on the end game for your company or firm, define long, medium and short term goals.
- **Create action steps.** Define action steps and tasks to complete each goal, assign someone responsible to perform and oversee each task and create deadlines for each task.
- **Create accountability.** Create a plan to hold everyone accountable to complete the tasks assigned to them.
- **Assess the plan.** Regularly assess the plan and determine whether it needs to be revamped, changed or tweaked and if so, how.
- **Remember, it's organic.** Strategic planning is an organic process that responds to change. It evolves. It responds. It grows. It breathes. Listen to the process and respond to what it is saying.

Prepare a Strategic Plan for Your Non-Profit

Initiate strategic planning at your non-profit. Secure the buy in from the leadership and the team and facilitate the creation and implementation of a strategic plan. How does a non-profit engage in strategic planning?

- **Assess current status.** Survey the leadership and team to determine the current status of your non-profit. Who does it serve? How does it serve them? What does it do well? What does it do poorly? Who else is providing the same service? How are they different? How are they the same? Where does funding come from? How is revenue generated? Ask what its strengths and weaknesses are. Ask what its opportunities and threats are. Ask about its successes and failures. Ask about its history and its trajectory.
- **Assess identity.** Discuss the non-profit's mission, vision, values, principles and purpose. Review how these have changed and why. How do others perceive the non-profit? What is its brand? Reputation?
- **Assess role.** Define the non-profit's role in serving a given population or community. How does it serve? How has its service changed?
- **Define future.** Review and analyze how the leadership and the team has defined the non-profit's current status, identity

©2021 Federation of Defense & Corporate Counsel

and role and based on this input and analysis, define its future. What is its future? What are its goals? What are its aspirations? How does it want it be defined? How does it want to be known? Where will it be in 10 years? 20? 30? What is its trajectory?

- **Define goals.** Based on the non-profit's goals, define long, medium and short term goals.
- **Create action steps.** Define action steps and tasks to complete each goal, assign someone responsible to perform and oversee each task and create deadlines for each task.
- **Create accountability.** Create a plan to hold everyone accountable to complete the tasks assigned to them.
- **Assess the plan.** Regularly assess the plan and determine whether it needs to be revamped, changed or tweaked and if so, how.

Prepare a Strategic Plan for Your Trade Association

Initiate strategic planning at your trade association. Secure the buy in from the leadership and the team and facilitate the creation and implementation of a strategic plan. How does a trade association engage in strategic planning?

- **Assess current status.** Survey the leadership and team to determine the current status of your trade association. Who does it serve? How does it serve them? How is it financially? What are its sources of revenue? How much does it have in reserves? How has its finances changed over the last five years? How has its membership changed? Has membership steadily increased or decreased over the last five years? How does the organization address membership? How does it serve its members? Ask what its strengths and weaknesses are. Ask what its opportunities and threats are. Ask about its successes and failures. Ask about its history and its trajectory.
- **Assess identity.** Discuss the trade association's mission, vision, values, principles and purpose. Review how these have changed and why. Why was the trade association formed? What was its original purpose? How has that purpose changed over time?

©2021 Federation of Defense & Corporate Counsel

- **Assess role.** Define the trade association's role in serving its members. How does it serve? How has its service changed? Why do members join? Why do members stay? What value do members derive from the trade association?
- **Define future.** Review and analyze how the leadership and the team has defined the trade association's current status, identity and role and based on this input and analysis, define its future. What is its future? What are its goals? What are its aspirations? How does it want it be defined? How does it want to be known? Where will it be in 10 years? 20? 30? What is its trajectory?
- **Define goals.** Based on the trade association's goals, define long, medium and short term goals.
- **Create action steps.** Define action steps and tasks to complete each goal, assign someone responsible to perform and oversee each task and create deadlines for each task.
- **Create accountability.** Create a plan to hold everyone accountable to complete the tasks assigned to them.
- **Assess the plan.** Regularly assess the plan and determine whether it needs to be revamped, changed or tweaked and if so, how.

Prepare a Strategic Plan for Your House of Worship

Initiate strategic planning at your house of worship. Secure the buy in from the leadership (both the clergy and the lay leadership) and the team and facilitate the creation and implementation of a strategic plan. How does a house of worship engage in strategic planning?

- **Assess current status.** Survey the leadership and team to determine the current status of your house of worship. What population does it serve? How does it serve them? What are its demographics? How have those demographics changed? How much does it draw from the immediate surrounding community? How about beyond that? From where does it generate donations? How does it generate revenue? What is its size, in terms of members and congregants? How has that changed over the last years? 10 years?
- **Assess identity.** Discuss the house of worship's mission, vision, values, principles and purpose. Review how these have changed and why. Why was

©2021 Federation of Defense & Corporate Counsel

the house of worship formed? What was its original purpose? How has that purpose changed over time? How does it serve others? How has that service changed? What is its belief system? What is that based upon? Has that changed? Is it affiliated with a national or umbrella organization? What role does the national organization play?

- Assess role. Define the house of worship's role in serving its members. How does it serve? How has its service changed? Why do members join? Why do members stay? What value do members derive from the house of worship? Why do members come? How often do they come? How does it serve the community? What needs does the local community have and how is it serving and meeting those needs?
- Define future. Review and analyze how the leadership and the team has defined the house of worship's current status, identity and role and based on this input and analysis, define its future. What is its future? What are its goals? What are its aspirations? How does it want it be defined? How does it want to be known? Where will it be in 10 years? 20? 30? What is its trajectory?
- Define goals. Based on the house of worship's goals, define long, medium and short term goals.
- Create action steps. Define action steps and tasks to complete each goal, assign someone responsible to perform and oversee each task and create deadlines for each task.
- Create accountability. Create a plan to hold everyone accountable to complete the tasks assigned to them.
- Assess the plan. Regularly assess the plan and determine whether it needs to be revamped, changed or tweaked and if so, how.

©2021 Federation of Defense & Corporate Counsel

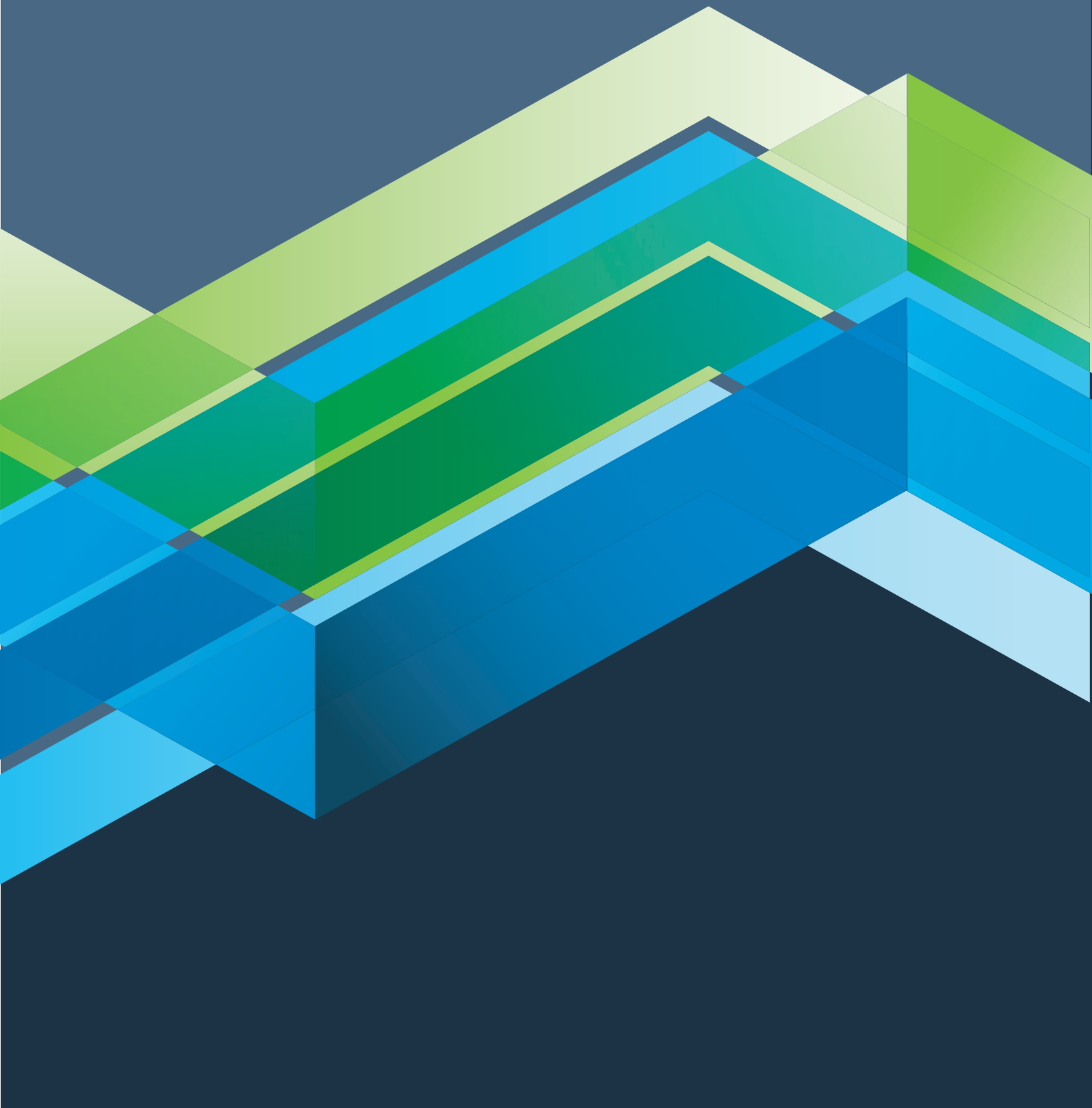
Prepare a Strategic Plan for Your Family

Initiate strategic planning with your family. Secure the buy in from your whole family and facilitate the creation and implementation of a strategic plan. How does a family engage in strategic planning?

- **Assess current status.** How would you describe your family dynamics? What activities and goals bring your family together? What projects does your family work on together? What are your family's customs and traditions? What do you enjoy doing together? What activities do you avoid? Where do you vacation? What activities do you engage in together yearly?
- **Assess identity.** How would you describe your family? How do you think others perceive your family and its dynamic? How does your family support one another? What has your family accomplished as a family? What are the goals of your family members and has the family supported them? How does the family support the individual family members?
- **Assess role.** How does the family come together? How does the family help its members when a family member is struggling? How does the family handle family struggles? How does the family overcome family struggles?
- **Define future.** What does the family want to do and accomplish in the near and far term? Where does the family see itself in the coming years? Will the family grow? Will it move? Will it have an impact beyond the immediate family members? What are its goals?
- **Define goals.** Based on the family's goals, define long, medium and short term goals.
- **Create action steps.** Define action steps and tasks to complete each goal, assign someone responsible to perform and oversee each task and create deadlines for each task.
- **Create accountability.** Create a plan to hold everyone accountable to complete the tasks assigned to them.
- **Assess the plan.** Regularly assess the plan and determine whether it needs to be revamped, changed or tweaked and if so, how.

©2021 Federation of Defense & Corporate Counsel

Teaching Strategic Planning



Once you learn and apply strategic planning in your own life, in your own family, in your own firm, in your own company and in your own house of worship, you need to teach others how to engage in strategic planning. Strategic planning is transformational. Don't just transform yourself. Teach others how to transform themselves. Don't just transform your firm, company or organization. Teach others how to transform their firms, companies and organizations. Do you want to increase your impact? Expand your footprint? Grow your influence? Learn how to plan strategically. Plan strategically. And then teach others how to plan strategically. Do it and then teach it. You want to change the world? Do it and then teach it.

Empowering Others to Strategically Plan

Once you apply strategic planning in your own life and start seeing results, much like pursuing a successful diet and exercise plan, share your experience with friends and colleagues. If strategic planning works for you, not only will you see results, but those around you will notice too and they will want to learn your secret. Invite them to coffee, share your process with them and encourage them to engage in their own strategic planning. Many have never heard of strategic planning. Those who have don't fully understand it. Many assume it only applies to businesses, not individuals. But once others see it works, specifically that it worked for you, they'll want to learn how to apply what you did to their lives. Explain what you did. Answer questions. Be patient. Answer more questions. Explain anyone can engage in strategic planning. Everyone can benefit from it. Everyone can learn and apply it to their life. Empower others to engage in it.

©2021 Federation of Defense & Corporate Counsel

Teaching Others to Strategically Plan

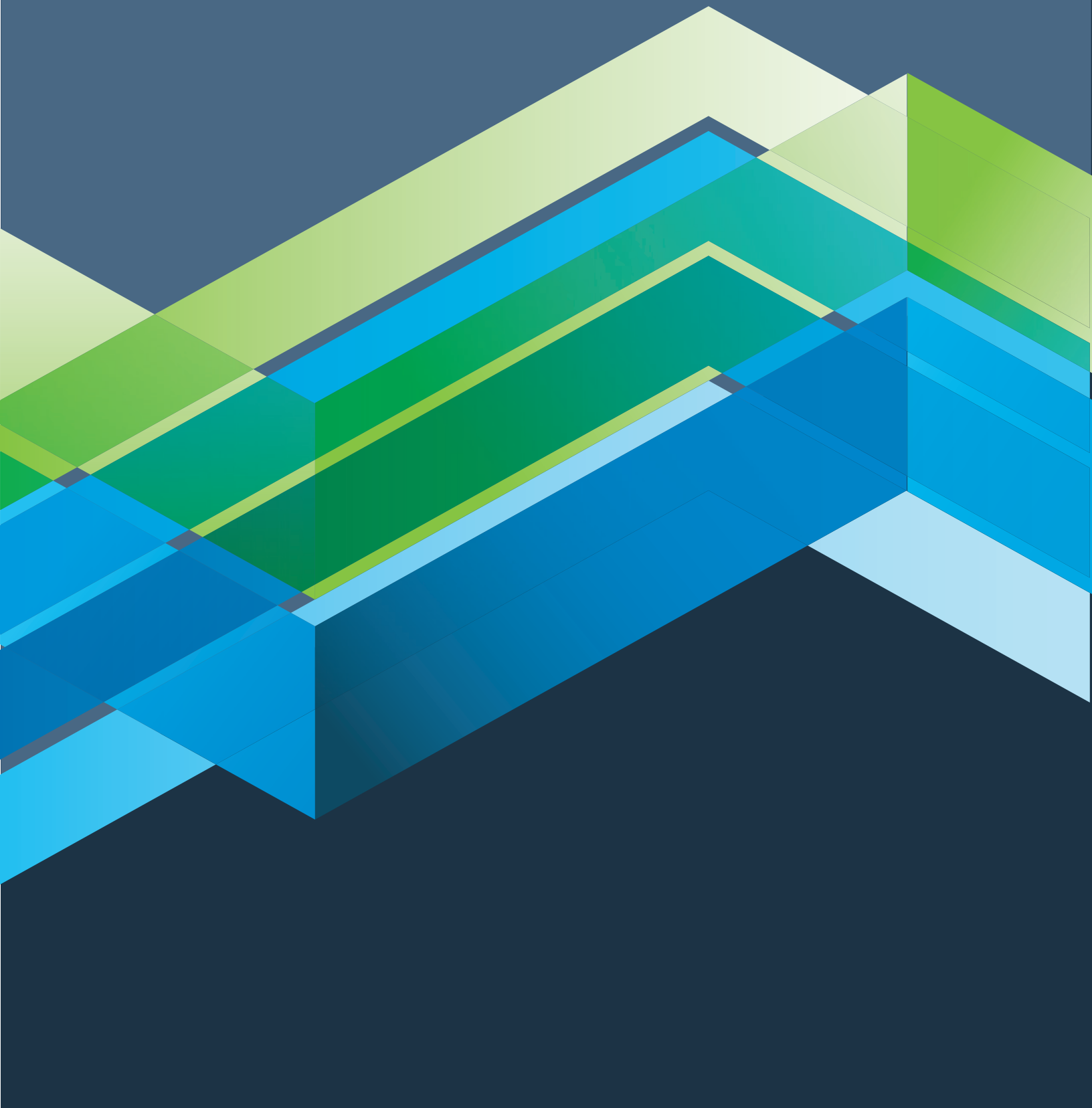
Once you empower others to pursue strategic planning, and they desire to apply strategic planning to their own lives, teaching them won't be difficult. Walk them through the process this book walks you through. Provide them a copy of this book and explain what you learned and how you applied what you learned. Share your strategic plan with them, or if you don't feel comfortable doing so, describe your process in creating and pursuing your strategic plan. Consider putting on a webinar or podcast describing your journey and encourage others to pursue their own similar journey to improve their lives and careers. The process itself – learning it – isn't difficult. Following through is the hard part, and the most important role you can serve is encouraging others and holding them accountable to pursue and enact the plans they crafted and drafted.

Creating an Army of Strategic Planners

An army of strategic planners starts with one soldier – you. You engage in strategic planning. It works for you. You share your success with others. They do it too. It works for them. They share their success with others. Others do it too. And so on. You're creating an army of true believers, of disciples who saw strategic planning work for someone else, applied it to their lives, experienced it working for them, shared their success, and the process then repeats. The more lives you touch, the more lives they touch. The more lives you transform, the more lives they transform. It's a natural, organic process that helps expand your zone of influence which helps others define and achieve their goals through the power of strategic planning.

©2021 Federation of Defense & Corporate Counsel

The Future of Strategic Planning



More companies, firms and non profits do not engage in strategic planning because it is time consuming. Expect one or more companies in the tech space to automate and streamline strategic planning. Strategic planning will shift from consultants, to platforms and programs which provide questionnaires, surveys, analytics and data to facilitate the process from conception to reality, from goals to achievement. What smart watches and fit bits did to nutrition and exercise, an app or a program or a platform will convert every business owner, every manager, every leader into a strategic planner. Those who can convert the necessary yet arduous process of strategic planning into a simple paint by numbers process for the masses, will revolutionize strategic planning and will usher in an era where every company, entity and person is thinking and achieving long term.

Automatic Strategic Planning

So much of strategic planning is asking the right questions and analyzing the answers. It's culling through the data and evaluating what is working and what isn't, what a company or firm does well and what it doesn't, what it's known for and what it isn't. This is a time consuming process. If someone could create a series of questions, evaluations and surveys that get to the heart of the matter and applies various analytics and algorithms to evaluate the responses and data, the hardest, most time consuming part of strategic planning would be easier, more accessible, more predictable and more reliable.

Companies have learned to automate personality, IQ, leadership and management tests. Companies have automated learning about ourselves, who we are, our attitudes and feelings, our strengths and weaknesses, what motivates and inspires us. You can find, purchase and download a dozen or more tests that analyze who you are – your intelligence, your emotional quotient, your personality, your leadership style, your communication style, etc. Why can't this be done for strategic planning? Why can't we provide data and information and opinions and thoughts and ideas in one end and have a report analyzing all of that come out the other end which provides the foundation for an effective strategic plan? We have a rudimentary form of that now. This book is a rudimentary form of that. It walks you through the process of strategic planning. But you're expected to do the bulk of the work and that effort stops many from engaging in strategic planning. Making the process easier, more accessible and simpler has the potential to increase those who engage in, pursue and embrace strategic planning.

©2021 Federation of Defense & Corporate Counsel

Using Technology for Strategic Planning

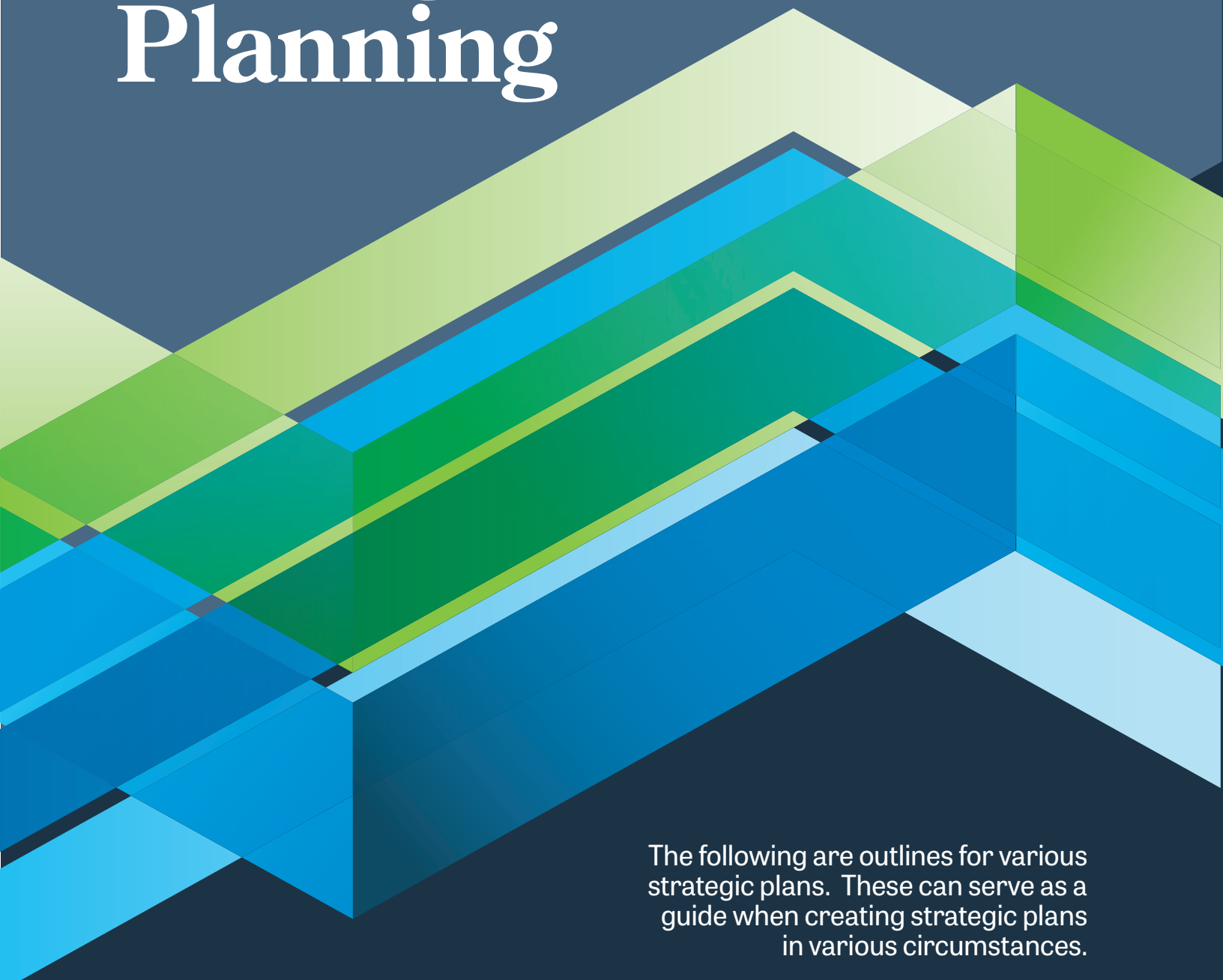
An effective online strategic planning platform would consist of questions whose answers could be analyzed to provide meaningful feedback and direction. Artificial intelligence, analytics and data harvesting would help companies, firms and individuals learn more about themselves, who and what they are, their why, what path they should pursue, what they should chase and how they can succeed. The questions posed would be a mix of choosing between alternatives (i.e. is your firm motivated more by pursuing X or Y; would your firm more likely choose client X or Y) and open ended questions (What clients does your firm want to pursue? What revenue does it want to generate?). We could envision a two tiered questionnaire process, where on one hand, hundreds of questions posing alternatives are answered to guide one into determining one's goals and how to achieve them, and on the other hand, more open ended questions where the answers are run through AI, to see what patterns, ideas and plans emerge which can serve as the building blocks for an effective strategic plan. Think of it as a supercharged personality test, but instead of helping you figure out your personality, or the type of leader you are, or your management style, it helps you define your goals and helps you map one or more pathways to achieve them.

Changing the World through Strategic Planning

Strategic planning is often overlooked, under-utilized and misunderstood. Many consider it complex, even byzantine, and choose to bypass it. But a greater acceptance and embrace of the process would have wide ranging and positive effects, not just in companies and law firms, but in non profits and houses of worship, in families and individuals. A strategic planning revolution would be reminiscent of the big push in the last two decades for leadership training. Many companies, organizations, firms and houses of worship focused on teaching their team leadership skills. Many sent them to leadership camps, enrolled them in leadership programs, had them read leadership books and study successful leaders. This approach helped many immensely. A similar approach to strategic planning training will have similar positive effects. Creating a plan and executing it is crucial for the success of any entity and individual.

©2020 Federation of Defense & Corporate Counsel

Appendix of Samples of Strategic Planning



The following are outlines for various strategic plans. These can serve as a guide when creating strategic plans in various circumstances.

Sample Strategic Plan for a Company

DISCUSS THE FOLLOWING

- What is your mission statement?
- What is your vision statement?
- What are your values?
- What are your first principles?
- Based upon these, what is your purpose?
- What are your strengths? Weaknesses? Opportunities? Threats?
- What is your reputation?
- What is your brand?
- What is your market?
- What is your pitch or hook?
- As Simon Sinek says, what is your "why?"
- Based upon all of this, what are your goals?
- What are the action steps to achieve your goals?
- Who will be responsible for each action step?
- How will you hold your team accountable to complete the action steps?
- How will you measure success?
- How do you determine if the action steps chosen achieve the objectives chosen?
- If action steps are not proving fruitful, what process do you have to change them?

ONCE YOU HAVE DISCUSSED AND ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Division of labor for action steps
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule of follow up meetings to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

Sample Strategic Plan for a Start Up

IF YOU'RE PLANNING A START UP, ASK YOURSELF THE FOLLOWING

- What is your product or service?
- Who is the consumer or client for your product or service?
- What differentiates your product or service?
- As Simon Sinek says, what's the "why" for your start up?
- Where is the money coming from?
- How much money do you need?
- What's your operating budget?
- How will you break into the market?
- How will you seize market share?
- How will you market your product or service?
- What are the strengths? Weaknesses? Opportunities? Threats?
- Is this a side hustle? If so, what's your plan to balance your day job with your start up?
- How much are you willing to put on the line for your start up?
- Where is your start up at year 1? Year 5? Year 10?
- How will you expand it? How will you grow it? How will you scale it?
- What are you afraid of? How real are these fears? How can you address them?

ONCE YOU HAVE DISCUSSED AND ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Division of labor for action steps
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule of follow up meetings to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

Sample Strategic Plan for a Non-Profit

IF YOU'RE PLANNING TO CREATE A NON-PROFIT, ASK YOURSELF THE FOLLOWING

- Why do you want to do it?
- Is someone else meeting the needs you want to meet? If so, are you better served partnering with them?
- Is it a vanity project?
- Is your primary motivator to help those who will benefit from it? Or do you have an ulterior motive? If so, what?
- What other non profits are already in the space you want to penetrate? What are they doing? How are they doing? Who are they serving? How are they serving them? How are they generating revenue? How are they generating donations?
- Do you know how to create a non-profit? If not, do you plan on hiring a lawyer or accountant to assist? If so, do you know the costs associated with that?
- How will you generate donations? Revenue?
- How will you structure your non-profit?
- Your non-profit will serve whom? How? By what means?
- What's your long term plan for it? Where do you see it in 5 years? 10? 15?
- How will you balance your day job with your non profit obligations?
- What staff will you hire? What salaries and benefits do you anticipate offering? Where will the money come from to pay for these?

ONCE YOU HAVE DISCUSSED AND ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Division of labor for action steps
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule of follow up meetings to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

Sample Strategic Plan for a Trade Association

IF YOU'RE PLANNING TO A CREATE A TRADE ASSOCIATION, ASK YOURSELF THE FOLLOWING

- Whom will the trade association serve?
- Is there an existing association or organization already serving those individuals?
- What will the trade association do? What services will it provide? To Whom? How?
- How will the association be structured?
- What sources of revenue will sustain the association?
- Who will your members be? What will be the membership fees? What services will they receive for these fees?
- Will the association do any advocacy? What? How?
- How will the association represent the interests of its members?
- Who will the association employ?
- What will be the governance structure of the association?
- Will the association partner or work alongside of other associations? Which ones? How?

ONCE YOU HAVE DISCUSSED AND ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Division of labor for action steps
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule of follow up meetings to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

Sample Personal Strategic Plan

IF YOU'RE PLANNING TO PREPARE A PERSONAL STRATEGIC PLAN, ASK YOURSELF THE FOLLOWING

- What are your talents?
- What are your passions?
- What are your dreams?
- Where do your talents, passions and dreams intersect?
- What do you enjoy doing?
- What do you dislike doing?
- What are your strengths?
- What are your weaknesses?
- What were your dreams as a kid? In high school? In college? In law school?
- What do others say your strengths and weaknesses are?
- What big ideas keep you up at night, wake you up or distract you during the day?
- What legacy do you want to leave?
- What do you want to be remembered for?
- How do you want your obituary to read?

ONCE YOU HAVE ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

Sample Family Strategic Plan

IF YOU'RE PLANNING TO PREPARE A FAMILY STRATEGIC PLAN, ASK YOURSELF THE FOLLOWING

- What does your family want to accomplish together?
- What has your family discussed as group projects or objectives?
- If your family had more time together, what would you do?
- If your had more resources, what would you do?
- What does your family want to be remembered for?
- What influence does your family want to have?
- What change does your family want to create?
- What impact does your family want to have?

ONCE YOU HAVE DISCUSSED AND ANSWERED THE QUESTIONS, CREATE A STRATEGIC PLAN WITH THE FOLLOWING

- Mission Statement
- Vision Statement
- Values
- First Principles
- Purpose
- Meta Goals
- Meta Goals broken down into smaller goals
- Action Steps for each goal
- Deadlines for completing the action steps
- Budget
- Division of labor for action steps
- Measuring success of action steps
- Evaluating success
- Creating accountability
- Define process when aspects of action steps or goals fall short of expectations
- Create schedule of follow up meetings to measure success and address shortcomings

©2021 Federation of Defense & Corporate Counsel

FEDERATION OF DEFENSE & CORPORATE COUNSEL

FDCC

DEFENSE LAWYERS. DEFENSE LEADERS.

610 Freedom Business Center
Suite 110
King of Prussia, Pa 19406
www.thefederation.org