



Leadership Barometer 177 Your Personal Plan Robert T. Whipple, MBA CPTD



For the past 30 years, I have advocated that every professional, and especially every leader, have a personal plan. Run your life based on a personal plan, and you will make twice the progress than if you didn't.

The format for the plan can take many different forms based on your personal preference. I will share the format I like to use here. It works well for me, but you may prefer different elements based on your circumstances.

The process to create my Personal Plan

The process I use to generate the detailed material for my plan is documented in an article entitled [Renewal](#). The article was written in 2010. I do the process every year on New Year's Eve. It takes me most of the day to do it, and the product is a 60+ page PowerPoint file. The various sections are too personal to share with others. They are also way too complex, so I create a one-page summary that I call my "Framework."

The Framework contains the major elements of my personal plan for the year. The sections include my purpose, vision, mission, values, and behaviors on one side. On the other side, I show my key strategies, tactics, and measures. I make several copies on heavy-weight paper and laminate them.

Advantages of a personal plan

Having a documented personal plan gives me several advantages. One key benefit is that the vicissitudes of life will be more like ripples than tidal waves. I am able to accomplish more in a year or two than I would otherwise do in eight years. That is well worth one day a year to focus on my goals and strategy. Besides, it is kind of fun to invest in myself this way.

Another benefit is that I can turn down some potential distractions with confidence. I still have the ability to modify the plan if something major comes along. Most of the time, I follow the route I have chosen. The framework gives me a solid platform from which to work. I am calm and confident that I am doing the right things and making maximum progress.

A third benefit is that I can share my framework with clients and others. It gives an accurate view of what I am trying to accomplish. I have used my process with many clients, and it always produces excellent results for them. The process works equally well for companies as it does for individuals.

Sharing access to my format

You can use any format you wish for your plan. In case you want to view the format I use, I will include a [link to my template](#).

Feel free to use my format if you wish, or modify it to suit your own situation.

Conclusion

Investing time in creating your personal plan pays off big returns. You will find lower stress and greater success in all your activities.

Bob Whipple, MBA, CPTD, is a consultant, trainer, speaker, and author in the areas of leadership and trust. He is the author of: *The Trust Factor: Advanced Leadership for Professionals*, *Understanding E-Body Language: Building Trust Online*, and *Leading with Trust is Like Sailing Downwind*. Bob has many years as a senior executive with a Fortune 500 Company and with non-profit organizations