



# Strategic Plan

---

## INTRODUCTION

In the Uncommon Collaboratory, "strategy" means deciding what to do, in what order, by when, by who, and with what. This Strategic Plan is a deceptively simple but powerful guide to making the critical decisions about what comes first on the list and what doesn't make the list at all.

## HOW TO USE THE GUIDE

- Watch the included video where I walk you through:
  - Setting success metrics and milestones for your vision
  - Determining what investments and resources are needed
  - Identifying what to STOP doing in order to stay aligned with your vision
  - Anticipating impact and addressing obstacles
- Answer each question, in order, to the best of your ability. You can complete the PDF digitally, print the questions out, or use an application of your own write your responses out. Whatever your method, be sure to set aside some reflective time for yourself.
- Submit your completed (or draft!) strategic plan to me for feedback via Ask Julie if you'd like.

It's okay if you need to come back to your drafted plan multiple times. This can be an iterative process until it feels right.

Happy Strategizing!



# Strategic Plan

---

This Strategic Plan helps you see what it will realistically take to move from where you are today to where you want to be.

---

**Write your Vision Statement** (Transfer from Practical Vision Guide #6)

**1. Vision Achievement Date** \_\_\_\_\_

**Success Metrics** - What, specifically, is observably different now that you have achieved your vision? (Transfer from Practical Vision Guide #2)

**2. Halfway Date** \_\_\_\_\_

**Success Metrics** - What, specifically, needs to be different at halfway to your vision if you are to stay on track?

**3. Quarterway Date** \_\_\_\_\_

**Success Metrics** - What, specifically, needs to be different at quarterway to your vision if you are to stay on track?

## **PLANNING FOR INVESTMENT**

Given the quarterway success metrics, what needs to happen / be accounted for in the current planning period / budgeting cycle in order to get and stay on the path to success?

1. Identify investments and resources needed
  
  
  
  
  
  
  
  
  
  
2. Identify activities, expenditure, resources no longer needed / requiring phase out / causing distraction from the vision

## **PLANNING FOR IMPACT**

How will executing on this plan impact you and others and what do you need to put in place to ensure success?

1. Brainstorm both actual and potential intended / positive and unintended / negative impacts
  
  
  
  
  
  
  
  
  
  
2. Given the actual and potential impacts what is needed to ensure success? Does this affect investments above? What communication will need to happen by when?

## PLANNING FOR SUCCESS

Given the above impacts and success factors, what else might need to be considered?

Feasibility of vision given the costs and benefits. Are adjustments needed?

Consequences - both organizational and individual - of achieving (or not achieving) documented milestones and metrics. Can we live with them?

Commitment to goals from all responsible parties. Can this be secured?

Communication to all directly and indirectly impacted to gain necessary support. Who what, and by when?

---

This Strategic Plan is a critical step of the Leadership Roadmap which helps you develop a personalized journey from vision to strategy to sustained motivation.

Are you ready for the next step in YOUR journey?

*Learn About the  
Uncommon  
Collaboratory*





## Uncommon Collaboratory Members Get:

1:1 Kick-off coaching call to plan your path

What Drives You? program

Motivation Factor™ Pinpointer Assessment

16-pg custom report on your personal motivation

Personal Hierarchy of Motivation® Map

Leadership Roadmap Program and Custom Guide

### 4 Learning Tracks

- Leadership
- Management
- HR
- Life

### Live Group Coaching

- 4 personal motivation coaching sessions per month
- 3 business coaching sessions per month
- 1 life coaching session per month
- 1 Open Q&A with Julie per month

### 1:1 Guidance

- "Ask Julie" any time
- 1:1 coaching in group calls
- Up to 3 additional private coaching calls

## And More...

1 live conference quality Leadership Webinar per month

45+ downloads on leadership and motivation

Guided meditations for peace, focus and calm

Eligibility for SHRM, HRCI and other PDCs

[RESERVE YOUR SPOT BEFORE THE DEADLINE](#)