

A New Approach
to Authentic Leadership

*Hitting your goals has
never been this easy*

POWER POISE AND PRESENCE

STRATEGIC PLANNING
A Personal Workbook

LIZETTE WARNER PhD

Power, Poise, and Presence

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Leadership

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Preparation

This Strategic Planning Guide is a powerful tool. To get the most out of this tool, be prepared to dedicate time for reflection. In addition, the following items may be helpful for you to bring into this activity for your use.

- a. Your current year (2022) Growth and Goals
- b. Expenses from 2022
- c. Personal and Business changes
- d. Your accomplishments — It's ok to brag!
- e. 2022 and prior year results

Print out this guide and begin your review.

Reflection: Year in Review

1. Review your numbers
 - a. Gains or profit
 - b. Expenses
 - c. New revenue streams
 - d. New hobbies or activities
 - e. Repeat activities or projects
 - f. New activities or projects
 - g. Changes — What changed in 2022 from 2021 for you?

2. Compare your 2022 Results to 2021 Results

- a. What did you set out to accomplish in 2022? In 2021?
- b. What are your 2022 results?
- c. What were your 2021 results?

3. Reflect on your challenges and strengths.
Time machine yourself back to January 2022.

What have you accomplished?	What have you overcome this year?	What has gone well?
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4. What's been left on the table, undone or untouched from your 2022 goals?



5. Gratitude isn't just a good feeling. Gratitude is good for your mental well-being. Leaders operating from gratitude are more engaged and innovative. So for what are you grateful this year? Be very specific. Revisit and reflect on the previous question (5). What can you be grateful for in those things left undone or untouched?



Vision: Let's get clear

1. What's your vision for 2023? *(Be very clear and dream big. What is different for you 12 months from now?)*

2. Press Coverage! A Major Award coming your way! In a concise way (1-2 sentences), what is said about you or your business?

3. Press Coverage! A Major Award is coming your way in 2028! In a concise way (1-2 sentences), what do you want to be said about you or your business? *(Five years from now what are others saying about you?)*

Mission: Engage With Purpose

1. Who do I serve or who do I want to serve?

2. What do my stakeholders or customers need that I have to offer? *(See from the vantage point of others - what do they need most that you can offer?)*

3. How do I uniquely create value for those I serve?

4. What is the ultimate payoff for those I serve?
(How do my stakeholders or customers uniquely benefit from what I offer?)



5. Why should anyone choose me?



6. What is my ultimate payoff?



2023 Vision: Let's Get Clear

It is the end of 2023, you are _____ years old. This year you are celebrating_____.

1. You are on track to hit your 2023 goals but are not there yet. What else remains to be done to hit those goals? Where are you by the end of 2023 in your life or business? What have you accomplished by the end of 2023?

2. Take these 2023 accomplishments and use them to define your 2023 goals. Once you define them, prioritize your goals.

<i>Priority</i>	<i>2023 Goal</i>	<i>How does this help you reach your bigger goals?</i>

2023 Strategy

1. Strategic planning starts by taking your top 5 goals and creating strategies (the how) to actualize these goals. Consider your goal(s) (not yet achieved) and how you will actualize them into achievement(s).

2023 Priority Goal #1

- a. What specific thoughts/actions or steps do you need to take to achieve this goal?
- b. Notice if there are any dependencies for this strategy to be realized.
- c. Describe any resources you need to achieve this strategy.
- d. Set a goal-by-date. When will this be completed?

Strategies or actions to accomplish goal	Dependencies	What resources do you need?	By when?

2. Consider your 2nd priority goal (not yet achieved) and how you will actualize it into an achievement. Tip: Consider your strengths.

2023 Priority Goal #2

- a. What thoughts/actions or steps do you need to take to achieve this goal? Then consider the resources you'll need to accomplish it.
- b. Notice if there are any dependencies for this strategy to be realized.
- c. Describe any resources you need to achieve this strategy.
- d. Set a goal-by-date. When will this be completed?

Strategies or actions to accomplish goal	Dependencies	What resources do you need?	By when?

3. Consider your 3rd goal (not yet achieved) and how you will actualize it into an achievement. Tip: Consider your strengths.

2023 Priority Goal #3

- a. What thoughts/actions or steps do you need to take to achieve this goal? Then consider the resources you'll need to accomplish it.
- b. Notice if there are any dependencies for this strategy to be realized.
- c. Describe any resources you need to achieve this strategy.
- d. Set a goal-by-date. When will this be completed?

Strategies or actions to accomplish goal	Dependencies	What resources do you need?	By when?

4. Consider your 4th goal (not yet achieved) and how you will actualize it into an achievement. Tip: Consider your strengths.

2023 Priority Goal #4

- a. What thoughts/actions or steps do you need to take to achieve this goal? Then consider the resources you'll need to accomplish it.
- b. Notice if there are any dependencies for this strategy to be realized.
- c. Describe any resources you need to achieve this strategy.
- d. Set a goal-by-date. When will this be completed?

Strategies or actions to accomplish goal	Dependencies	What resources do you need?	By when?

5. Consider your 5th goal and how you will actualize it into an achievement. Tip: Consider your strengths.

2023 Priority Goal #5

- a. What thoughts/actions or steps do you need to take to achieve this goal? Then consider the resources you'll need to accomplish it.
- b. Notice if there are any dependencies for this strategy to be realized.
- c. Describe any resources you need to achieve this strategy.
- d. Set a goal-by-date. When will this be completed?

Strategies or actions to accomplish goal	Dependencies	What resources do you need?	By when?

Almost Ready to Begin

Everything that's come before is preparation for success. Your success rests in your hands.

1. What intention do you need to set that ensures you show up daily to work towards your vision? *(Example: I will be bold, Power isn't a position — It's a state of mind, All In, #1, Build - fail - learn - build)*

Your motto or intention should be terms or words that resonate or speak to you. Keep this posted somewhere prominent, and reflect on it as often as you need.

2. What will you lose if you don't hit your goals?

3. What does your future look like if you hit all of your goals?

4. What do you need to do now to ensure 2023 takes you toward your goals? *(What do you need to stop or start doing?)*

5. What must you remember as you embark on your Goals?

To learn more to boost your journey with the Power, Poise, and Presence Program, grab the [book](#) or be the first to get the **10 Brilliant Points: How to be the one others admire** experience [here](#).

1 Page Strategic Recap: My 2023 Motto or Intention

Vision Statement

2023 Goal 1 _____

Strategy #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

2023 Goal 2 _____

Strategy #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

2023 Goal 3 _____

Strategy #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

2023 Goal 4 _____

Strategy #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

2023 Goal 5 _____

Strategy #1 _____ #2 _____

#3 _____ #4 _____ #5 _____

As I embark on 2023 I want to remember

My future when I hit my goals
