

## **Renewal**

**by Robert Whipple: MBA, CPLP**

Every New Year's Eve, I go through a kind of renewal ritual. It is my gift to myself for having done my best for the past year, and it allows me to look forward to an even better year to come. I have recommended some form of this for all people who take my leadership classes. It does not need to be done on the New Year; some people like to do this on their birthday or some other specific day of the year. The point is to designate one day to reflect on what you have done, where you are, and what you intend to do in the coming year and beyond.

I will step you through my specific ritual, but recognize I am not advocating anyone adopt this exact formula. I do believe it is critical for you to check in on yourself in a substantial way at least once a year. Doing this allows you to feel good about your past efforts and create a rational plan for the next phase of your life. I find it sad that many adults go through the motions every year and never stop to think seriously about what is happening. It is as if they expect the world to do right by them without putting any energy into it themselves. We all know the universe does not work that way. If you wish to live a productive life, it is necessary to do some serious planning.

My process starts early in the day on New Year's Eve. I begin by going back over the calendar for the entire year and documenting all my key accomplishments. This is an uplifting start to the process, because I am reminded of the incredible forward momentum that has been built as a result of prior planning sessions. That encourages me to put more effort into the rest of the day.

I revisit the "Strategic Framework" for my business and my personal life, a document that I have been building for roughly 20 years. It exists as a PowerPoint slide deck because I am right brained and tend to think in PowerPoint. The actual slides should never be presented because they contain way too much information for anyone but

myself to view. Besides, there are a number of personal issues involved in several sections.

My current Framework has sections on the following topics:

**Objectives** - what I am trying to get out of life and work

**Values** - my fundamental beliefs about the nature of people and how the world works

**Vision** - where I expect to be in several years

**Mission** - what I am trying to do right now

**Behaviors** - things I promise myself I will do (and hold myself accountable for doing)

**Value Proposition** - the contribution my business makes to society and my clients

**Goals** - for next year, and for 5 years out - (I do two sets of goals because the actions required to achieve my close-in goals are different from what is required to accomplish long term objectives.)

**Major Accomplishments Last Year** - what I have actually done, in detail

**Revenue Projections** - a specific financial goal for next year, and also a projection for the next 5 years.

**SWOT Analysis** - my strengths, weaknesses, opportunities, and threats

**Strategic Plan** - the handful of strategic drivers I intend to pursue to accomplish my goals based on the SWOT analysis

**Tactical Plan** - a list of specific activities needed to accomplish my strategy

**Marketing Strategy** - the promotion strategy for several categories - media, advertising, logic for reaching target groups, etc.

**Sales Plan** - the sales dimensions strategy document (by segment)

**Publishing and Writing Plan** - how many articles, where, and any books etc.

**Online Presence Plan** - my search engine optimization (SEO), including use of upgraded website and BLOG capabilities

**Plan for Local and National Associations** - including what can I afford to keep doing (both financial and from a time perspective) & what I should stop doing

**Corporate Policies & Procedures** - the rules and assumptions I use to run my business

**Master Strategy Team** - my "Mastermind Group" as advocated by Napoleon Hill

**Strategy for Teaching and Academics** - how many courses, or which universities, etc.

**Strategy for Optimal Speaking** - patterns and associations, fee levels and pro bono strategy

**Possible Partnerships** - groups or individuals I want to work with in the coming year

**What Makes Leadergrow Unique** - statement I can use in advertising, and speaking introductions

**Directional Options for Next Year** - listing at least 3-5 options for course changing in my business or personal life

**Mind Map of Future Options** - because I think best in pictures

**Detail Pages** - for each option identified along with advantages and disadvantages of each

This exercise may seem like a lot of work, but it does not need to be done all at once. You can build it up over several years. Once the initial framework is constructed, it requires only about 6-8 hours to recast the material for the coming year. The benefit of doing this work is that, after it is done, it frees up your mind to spend maximum energy on execution rather than debating with yourself over every decision. You can confidently turn down opportunities if they do not fit your strategic plan, which creates more energy for your key drivers. Most of all, you will have the feeling that you are really charting your own course through life rather than just reacting to things that constantly come up.

I advocate some form of individual plan for every person. It does not need to be as extensive as my process, but if you will carve out a few hours every year to think about your own trajectory, your chances of living the kind of life you want will be greatly enhanced. The process will not stop you from having setbacks or periods of angst. Life has a few "curve balls" for each of us every year.

As Lou Holtz stated in *Do Right*, "I'm going to have at least three crises in the next 12 months, and so are you. But let me say this, and I believe it from the bottom of my heart. I have never seen a crisis that did not make us stronger if we reacted positively to

it. We can all benefit from crises in our lives because they are going to happen, and a crisis is just another way to test the greatness of an individual."

The benefit of having a concrete plan is that the vicissitudes of life will be more like ripples than tidal waves. You will be able to accomplish more in a year or two than you would otherwise do in 10 to 20 years. That is well worth one day a year to focus on your goals and strategy. Besides, it is kind of fun to invest in yourself in this way.

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