

Planning, Strategy & Scorecarding

Planning & Strategy Steps

To start your Personal Scorecard:

1. Identify which life arena or dimension you are focused on (e.g., Physical, Emotional, Psychological, Interpersonal, Long-Past, etc.)
2. Write down your SMART goal.
3. When do you plan to start it?
4. When do you plan to achieve?
5. Identify the benefits of achieving this goal (the why).

Next:

6. Make a list of any strategic actions steps you will need to get started (e.g., purchase gym membership, mark calendar, find accountability partner, etc.)

Then:

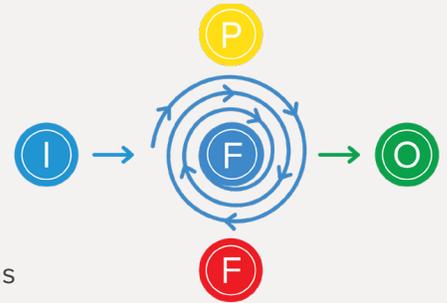
7. Break down your goal into milestones with corresponding celebrations to help you along the way.

Building Your Scorecard

It's now time to build your scorecard. Doing so helps you understand the 2nd Secret and iterating towards your SMART Goal.

The 2nd Secret is comprised of 5 elements:

1. Focus: The factor/dimension that will be the center of your attention
2. Inputs: What you going to do and the resources needed to do it
3. Process: Exactly how you are going to take action
4. Outcome: What's showing up as you take action
5. Feedback: The internal/external loops needed to modify your actions



Let's get specific about each of these 5 elements

1st: Define Your Focus

For this scorecard my **Focus (WIN)** will center around this factor or dimension: _____

2nd: Define Your Inputs

These are the exact Inputs (investments) I will make (time, resources, actions):

Time: _____

Resources: _____

Actions: _____

I will measure my inputs (what I'm going to do) using these units (e.g., minutes, hours, calories, calls made, pages read, etc.)

Define your Input measure (must be quantitative)? _____

What the minimum number acceptable? _____

What the maximum number possible? _____

3rd: Specify Your Process

This is the exact **Process** I will use to take action:

4th: Define Your Outcome

What exactly do you expect to achieve by investing these **Inputs** through this Process?

How Will You Measure Your Outcome?

There are two types of Outcomes you can measure: One is quantitative or an exact measure (e.g., weight lost, an exam score, or clearly defined measurable change). Your metric may also be qualitative (e.g., self-rating, other rating, or self-reflection).

How will you measure your Outcome? Will you have an exact number or an internal or external rating scale?

If quantitative, what will you be counting? _____

What is the highest metric you might see each time you measure? _____

What is the lowest metric you might see each time you measure? _____

If qualitative, what scale will you be using (1-5, 1-10, 1-100, etc.): _____

What is the highest metric you might see each time you measure? _____

What is the lowest metric you might see each time you measure? _____

As you take action via your Inputs and Process, recognize that there are 5 possible outcomes:

1. Doing something to get anything (e.g., pure experimentation)
2. Doing something more to get something more (e.g., studying more/higher score)
3. Doing something more to get something less (e.g., more meditation/less stress)
4. Doing something less to get something more (e.g., less negative talk/better mood)
5. Doing something less to get something less (e.g., less carbohydrates/less weight)



5th: Analyze Your Feedback

There are 2 types of feedback: Internal and External. Since you are measuring your Outcomes either quantitatively (specific metrics) or qualitatively (an internal and/or an external rating scale), you can take all of this Outcome data and reflect upon it utilizing these core questions:

What is working? _____

What is not working? _____

What will you do differently going forward? _____

Going forward may include refining any of your inputs (time, resources, actions) and/or process (the actions you are taking) until you identify the right combination inputs and process give you the result you want.

Keep In Mind:

- Your goal must be SMART
- Make sure you have the resources you need to be successful—including support
- Be specific and quantitative about your Inputs (create your min/max range)
- Know which of the 5 cases you are looking for up front
- Make sure you have a meaningful way to measure your Outcome. If it's not quantitative, create a scale that works for you (rating scale or even smiley faces)
- Feedback loops are vital. Look for both Internal and External sources
- Be intentional about noticing the connection between your Inputs and your Outcomes. Are you seeing success?
- Log and journal what you are experiencing.
- Be flexible. If you are not getting the results you want, then tweak the experiment. By modifying the Inputs and/or the Process
- Make sure you are measuring the right things!
- Remember that iterating towards success is the 2nd secret and requires placing your attention with intention on whats important now (WIN)
- Once you are successful do it all over again. There is no finish line!

Planning, Strategy & Scorecarding

Life Arena/Dimension:

SMART Goal:

Date engaged:

Expected completion date:

Date completed:

Expected benefits of achieving goal:

Expected benefits of achieving goal:

Expected benefits of achieving goal:

Strategic Action Steps (one time tasks I need to do to get started):	Start date:	End date:
Task 1:		
Task 2:		
Task 3:		
Task 4:		
Task 5:		

Milestones:	Celebrations:
Goal achieved:	Date completed:

Example

Planning, Strategy & Scorecarding		
Life Arena/Dimension: Physical		
SMART Goal: Achieve a weight of 180 pounds within 5 weeks (currently 190)		
Date engaged: 9/1	Expected completion date: 11/1	Date completed:
Expected benefits of achieving goal: Decrease stress on my back and joints		
Expected benefits of achieving goal: Fitting into my clothes again		
Expected benefits of achieving goal: General improvement in health		

Strategic Action Steps (one time tasks I need to do to get started):	Start date:	End date:
Task 1: Purchase gym membership		
Task 2: Buy workout clothes and shoes		
Task 3: Ritualize calender (3 times weekly)		
Task 4: Ask Bill to be my accountability partner		
Task 5:		

Milestones:	Celebrations:
First 3 pounds	Favorite dinner
Second 3 pounds	Movie night
Third 3 pounds	Buy new shirt
Final pound	Buy new suit
Goal achieved: 180!	Date completed: Take family out to dinner!

Month 1: Daily Observations

Day 1	
Day 2	
Day 3	
Day 4	
Day 5	
Day 6	
Day 7	
Day 8	
Day 9	
Day 10	
Day 11	
Day 12	
Day 13	
Day 14	
Day 15	
Day 16	
Day 17	
Day 18	
Day 19	
Day 20	
Day 21	
Day 22	
Day 23	
Day 24	
Day 25	
Day 26	
Day 27	
Day 28	
Day 29	
Day 30	
Day 31	

Month 2

DOING (Input Measure):

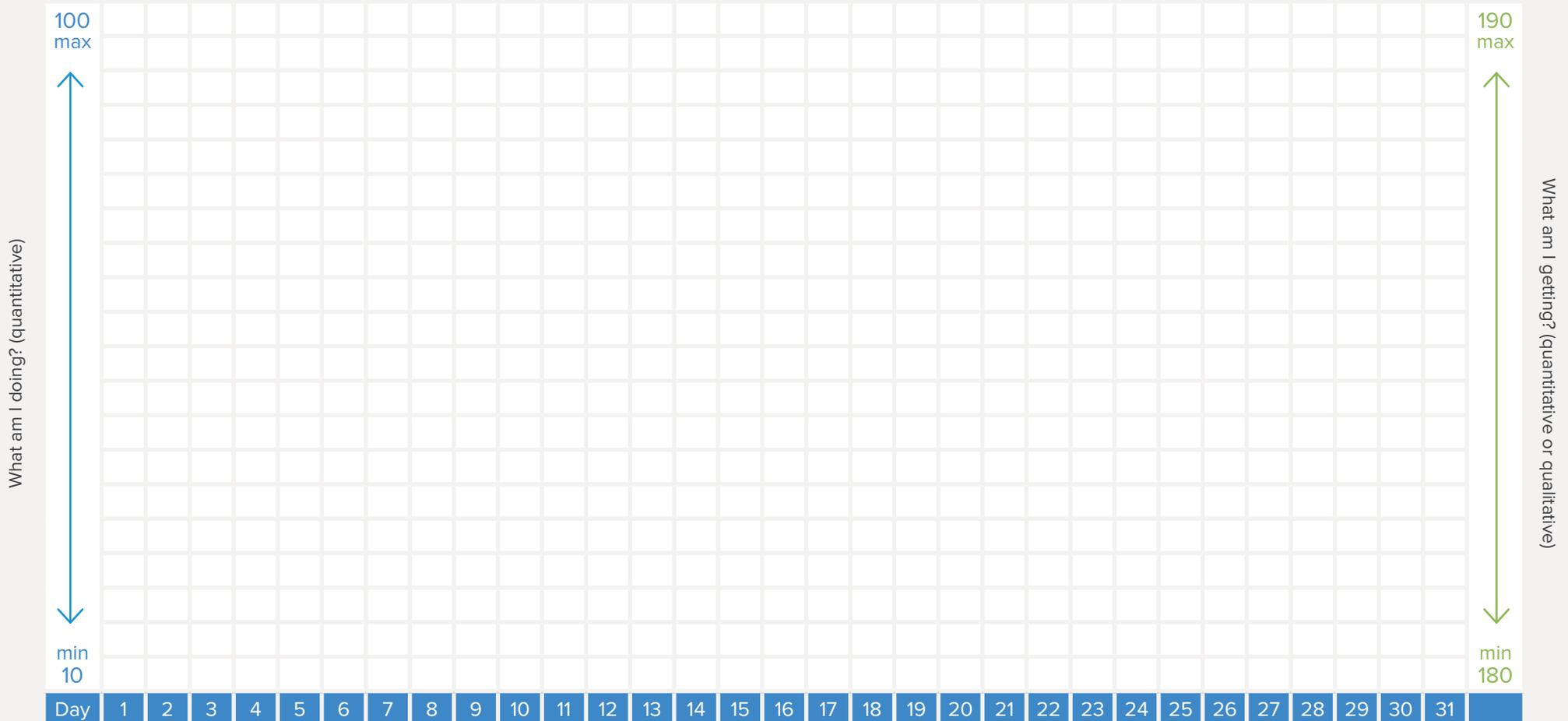
What am I going to do? How am I measuring my actions?
Must be quantitative!

Create Min/Max range: _____

GETTING (Outcome/Results Measure):

What am I achieving? How am I measuring my outcomes/
results? Might be quantitative or qualitative!

Create Min/Max range: _____



Daily Progress

(Trending Up? Trending Down? Neutral?). Observe your trends. Are you winning, losing, or neutral?

Month 2: Daily Observations

Day 1	
Day 2	
Day 3	
Day 4	
Day 5	
Day 6	
Day 7	
Day 8	
Day 9	
Day 10	
Day 11	
Day 12	
Day 13	
Day 14	
Day 15	
Day 16	
Day 17	
Day 18	
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Day 20	
Day 21	
Day 22	
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Day 28	
Day 29	
Day 30	
Day 31	

Month 3

DOING (Input Measure):

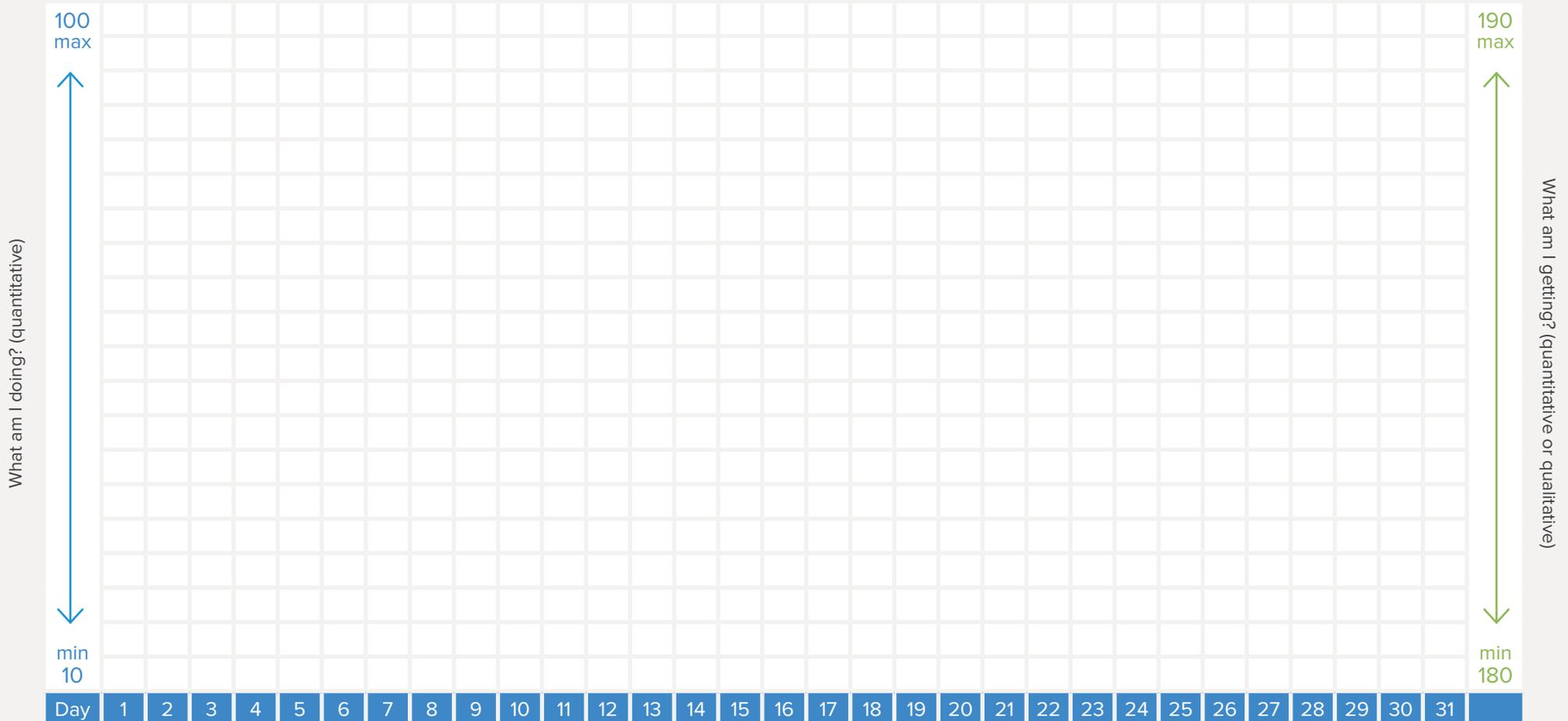
What am I going to do? How am I measuring my actions?
Must be quantitative!

Create Min/Max range: _____

GETTING (Outcome/Results Measure):

What am I achieving? How am I measuring my outcomes/
results? Might be quantitative or qualitative!

Create Min/Max range: _____



Daily Progress

(Trending Up? Trending Down? Neutral?). Observe your trends. Are you winning, losing, or neutral?

Month 3: Daily Observations

Day 1	
Day 2	
Day 3	
Day 4	
Day 5	
Day 6	
Day 7	
Day 8	
Day 9	
Day 10	
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Day 12	
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