



Developing Your Plan for Success:

**Creating Your Own Personal
Strategic Plan**

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Developing Your Plan for Success

- “Success is where **preparation** and **opportunity** meet” (Bobby Unser)
- “The best way to predict the future is to **invent it**”
- “If you don’t know where you are going, you will never get there!”
- Have a plan, but be flexible



Developing Your Plan for Success

- **Objective:** To help you develop and make effective use of a strategic planning to further your path to success.

Developing Your Plan for Success

- **Background and Experience – Business Planning**
 - Cargill Worldwide Law Dept. Business Plan Team Member
 - Cargill Worldwide IP Law Business Plan Team Member
 - Cargill IP Regional Coordinator for LatAm
 - Developed IP Plan for LatAm Region

Developing Your Plan for Success

- **Background and Experience – Bar Planning**
 - 2000-2003 MHBA Strategic Planning
 - 2003-2005 HNBA Corporate Advisory Board
 - 2006 HNBA Strategic Plan
 - 2011 HNBA 3-Year Strategic Plan
 - 2015 MHBA 3-Year Strategic Plan
 - 2016 MNAPABA 3-Year Strategic Plan
 - 2016 MSBA D&I Council 3-Year Strategic Plan
 - 2017 MABL 3-Year Strategic Plan
 - 2017 MN FBA 3-Year Strategic Plan
 - 2018 Minneapolis Jewish Foundation Strategic Plan
 - 2018 MHBA Strategic Plan
 - 2019 Lawyers Concerned for Lawyers Strategic Plan

Developing Your Plan for Success

- Background and Experience – Personal Planning
 - UCLA Latino Leadership Institute
 - Efficacy Training
 - Personal Business Plans (yearly)
 - Candidacy for HNBA National President
 - Move to Private Practice
 - Move to the Bench
 - Cargill Yearly Annual Goals and Personal Development Plan (2001-2013)



Why Develop a Plan for Success?

**“If you don’t know where you are going,
you will never get there!”**



Why Develop a Plan for Success?

- Need to define the goals you want to reach
- Without a plan you can ...
 - get too easily distracted
 - lose track of your goals
 - take on too many goals (should be 3-5)
 - have “scope creep” (straying from mission/goals)
- A plan forces you to be thoughtful and deliberative about what you do and the choices you make

What is a “Plan”?

- Business Plan
 - Strategic Plan
 - Personal Operating Plan
 - Game Plan
 - Action Plan
 - Performance Management Plan
 - Development Plan
 - Key Results Areas
 - To-Do List
-
- It doesn't matter what you call it as long as you create it, communicate it, and execute on it

What is a “Plan”?

- Personal plan must be consistent with you
 - **Personal brand** – need to define who you are
 - Consistency and authenticity leads to a powerful story
 - If not, creates dissonance internally and externally
 - For personal plan, talk to your “**Board of Directors**”



Sidebar One:

What is a “Personal brand”?



Personal Brand

- Integral part of developing an effective personal strategic plan
- For business plans, look to mission statement
- Your personal brand is your “mission statement”
- It takes time to develop, but time well spent



A Personal Brand is a way of succinctly establishing:

- **Who** you are,
- **How** you want to be perceived, and
- **What** you stand for.
- Think of it as your personal elevator speech.



Personal Brand: Who you are and What you stand for

- Personal brand – “Put others in a position to succeed,”
“Be an advocate for justice”
- What drives you?
- What are you passionate about?
- Brand same in personal and professional life



Personal brand: What you stand for

- How are you perceived???
- May not be how you **want** to be perceived
- Talk to your “Board of Directors” to get candid feedback
- Define yourself, rather than let others define you!

Examples of Personal Brands

- Denise Morrison, CEO of Campbell Soup Co.: “To serve as a leader, live a balanced life, and apply ethical principles to make a significant difference.”
- Oprah Winfrey, Founder of the Oprah Winfrey Network: “To be a teacher. And to be known for inspiring my students to be more than they thought they could be.”
- Amanda Steinberg, Founder of Dailyworth.com: “To use my gifts of intelligence, charisma, and serial optimism to cultivate the self-worth and net-worth of women around the world.”
- Katie Arnold, Talk Less, Say More: “To constantly be striving to be the best version of myself—in my job, with my health and fitness, with my relationships with family and friends, and with my emotional well-being.”
- Author Andy Andrews: “My mission is to help others live the lives they would if they only knew how.”



Sidebar Two:

What is a “Board of Directors?”



Board of Directors

- Why Do You Need a Personal Board of Directors?
 - Provides guidance, support, and feedback
 - Helps you to stay focused on your plan
 - Focus is on what is in your short-term and long-term best interests
 - Aids with major decisions



Assembling Your Board

- There is no one size fits all
- Any reasonable number works (often start with 10-12)
- Include people who know you in different capacities
- May change over time
- Don't need to formally ask if they will serve on the board
- They don't need to know one another but may



Assembling Your Board – Strive for Diversity

- Location (local, national, international)
- Experience/Background
- Thought (conservative/liberal)
- Personality Style
- Risk Tolerance
- Gender
- Times (childhood, high school, college, law school, etc.)
- Industries
- Levels
- Age/Generation
- Ethnicity

What Does Each Person Bring?

- Challenger
- Cheerleader
- Motivator
- Accountability Partner
- Opportunity Seeker
- Mentor
- Sponsor
- Communicator/People Person
- Big Picture Thinker



Create. Maintain, and Use Your Board

- Be sure they are aware of your personal brand and strategic plan
- Confide in them
- Be brutally honest
- Share your vision, aspirations, goals, thoughts, fears
- Help them to help you



Creating Your Personal Strategic Plan

“The best way to predict the future is to invent it!”

How Do You Create a Plan?

- Brainstorm on your goals and make a list (“who”)
- Narrow list down to 3-5 goals (what - general)
 - e.g., ↑ book of business
- List deliverables/strategic areas (what – specific)
 - e.g., ↑ network

How Do You Create a Plan?

- Steps/Action Items (“how”)
 - e.g., join bar associations (step)
 - e.g., meet 10 new people at each bar event and follow up (action item)
- Status/updates (“when”)
 - e.g., complete by 12/31/19
- Metrics – what gets measured gets done!
 - e.g., meet 100 new people and follow up in year one

How Do You Create a Plan?

- Communicate plan to others
- Studies show it leads to success - accountability
- Plans take time! It can takes days, weeks, or even months.

SMART Guidelines

- Specific (“to be successful” is too general)
- Measurable (e.g., ↑ have five new clients by 12/31/2020)
- Attainable (must be reasonable)
- Relevant (consistent with personal brand)
- Time-bound (set deadlines/milestones)

Summary

- Set goals, consistent with personal brand
- Determine steps and actions to take
- Set timeline
- Communicate to others, including your Board of Directors (↑ chances of success)
- Execute on plan
- Update, and be flexible to meet opportunities



Only the beginning . . .