

SMART TRANSITIONS BEGIN WITH A PLAN

I have analyzed and defined five key personality traits and tendencies of the people who are most likely to benefit from the planning process presented in the organization of this book. The reliability of this assessment of personality traits has held true regardless of a person's current economic situation, education, or rung on the ladder of recognition.

Success-driven workaholic who thrives on information
Measures self in a rational and objective manner
Accepts fact that leadership growth requires a spiritual center.
Remains in control at all times, if at all possible
Trusts that transition and change are opportunities for growth

In my practice, I have found that smart people in transition naturally gravitate to any deliberative process that promises to slow them down enough to help them develop a clear perspective for making positive changes in their life. My solution is to organize the chapters in this book to track a logical sequence of priorities.

Values & Vision	Define your reason for being and the logic to your life.
Career Mission	Develop confidence about your future work.
Assumptions	Frame a concise statement of your management style.
Stakeholders	Identify those for whom you build bridges and why.
Objectives	Set measurable & time-sensitive priorities.
S.W.O.T.	Analyze the hard truths about your current situation.
Key Decisions	Clarify the decisions to focus on for the next year.
Action Plan	Avoid Henry's awful mistake.

The result is a flexible-yet-controlled interactive environment—what I believe to be a unique, compelling experience—where you will be encouraged to inquire into the facts and nature of your current situation ... moving forward with deliberate speed towards the transition you will make.

I sincerely thank you for deciding to invest your time and money in the thoughts and words of an author and business coach who has learned the hard and slow way that ... if you don't design your life, someone who thinks they're smarter than you will design it for you.

So, for Heaven's sake, design a life that works. It's time.

Michael Alan Tate

CONCISE PLANS LEAD TO ACTION

In the mid 1990s, I joined Vantage Associates, a management consulting firm that specializes in strategic planning projects with senior level teams. At Vantage Associates, our planning philosophy, techniques, and key questions are based on more than 25 years of experience in helping organizations create road maps to their desired future. This same philosophy and methodology has helped countless individuals think more clearly and strategically about how to move their career and personal lives to a more fulfilling and productive level.

When I first began with Vantage Associates, my job was to work with the leaders of these teams, guiding them to design leadership development plans to support their goals and their organizations' business initiatives. My audience may have changed but I still faced the inevitable conflict between the broad scope of the process and the need for a simplified statement of results—in a world where binders of 100+ pages remained the norm!

Meanwhile, my business partners had developed a way to summarize multi-year strategic business planning projects onto one sheet of paper. As the ancient saying goes, “The ox you are looking for, you might be sitting on top of.” The answer I was seeking for a functional, easy-to-use personal life-strategy was right there, but it took another insight to bring it to light.

The genesis for the ON THE SAME PAGE PLANNER™ (sample plans are found between each chapter and a planner template is printed on the inside of the dust jacket for your convenience) occurred in 1996. My business partner had just completed an annual strategic plan update for a small, privately held company. The organization's entire plan had been condensed to one side of an 8 ½ X 11 page. As the meeting closed, with the one-page plan in hand, the CEO turned to the executive group and said casually, “Now that we have our company plan on one side of this page, what would it take for each of you to write your personal strategic plan on the other side of the page?”

I could not have anticipated how this CEO's off-the-cuff request to his staff would yield truly extraordinary results. Since that time, his family business began trading on the New York Stock Exchange and today is a leading player in national real-estate markets. For my part, I took his request to heart and over the ensuing years refined this simple but powerful business and life alignment process. It became the cornerstone of my thriving consulting practice in leader development.

TOO MUCH OF A GOOD THING?

What are the key elements of your most motivating and productive environment? I have discovered over my years dealing with high achievers how easy it is for these very smart people to know what activities drain their energy. However, I have also found that they often have a tougher time in realizing and articulating “the opposite.” The following is a running list of typical motivating elements in most work assignments. It is provided to aid you in your effort to spell out your most motivating work environment quickly. Choose the motivating factors that, for you, “drain energy” and that, oppositely, “create energy.”

MOTIVATING FACTORS: Fast pace, plenty to do; Freedom to act, organize, implement, and control work; challenging assignments; Firm, objective supervision; Autonomy in setting and achieving goals; Individualized rewards; Variety of challenges; Clear lines of authority; Freedom from restrictions; Set policies and procedures; To know how work will be carried out and evaluated; Minimal interruptions and change; A consistent, low-key management style; To be trusted; Creative expression; Reflective time; Freedom from constant social demand; Self-determined schedule; Professional recognition/respect; A participative management style

Drains Energy

Creates Energy (The Opposite)