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# Are You Being Strategic About Your Life Plan?

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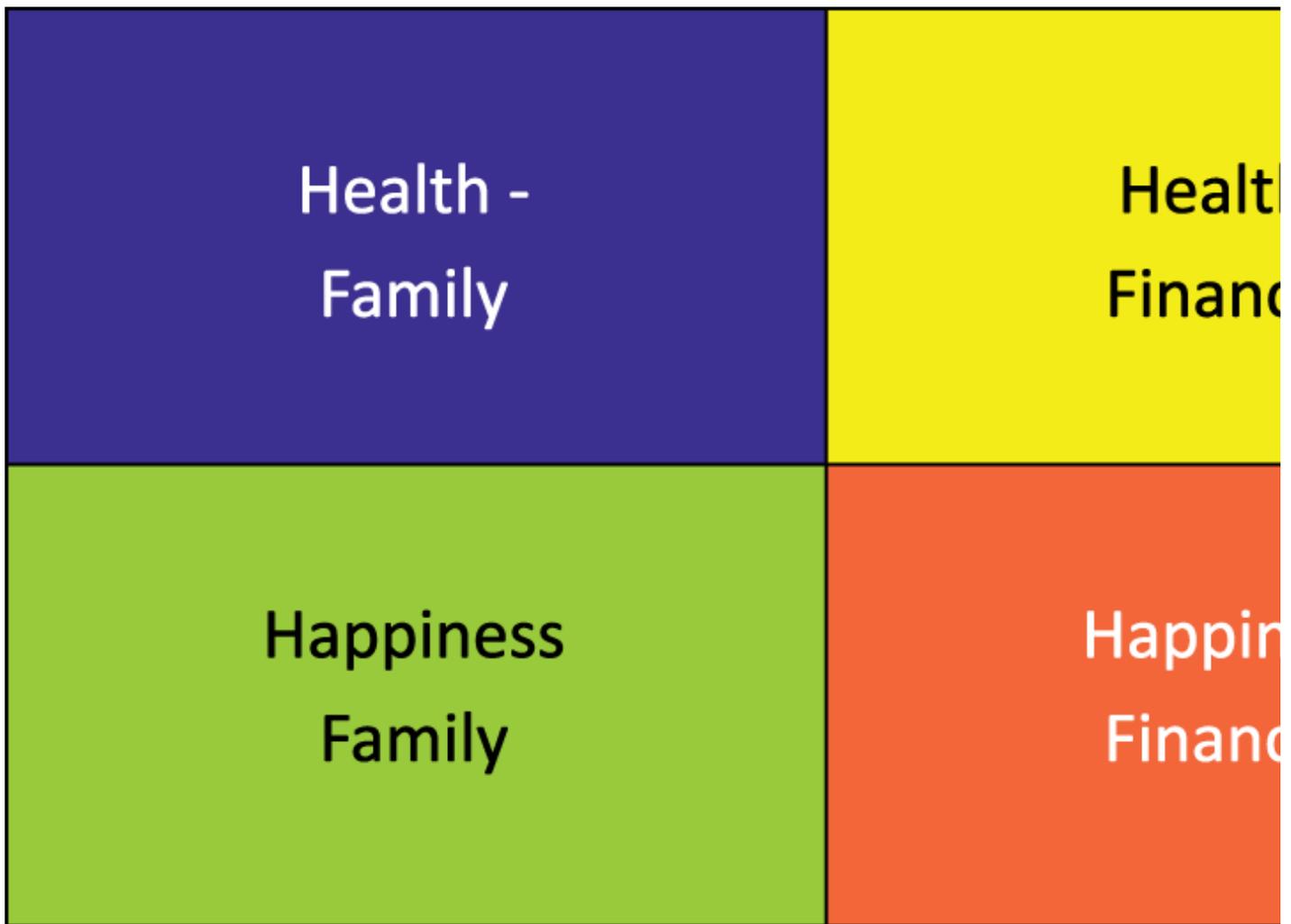
About this time last year, I was elbow deep in books about strategic plans for nonprofit organizations. Having been through the process with my law firm, I had some familiarity with the topic. But this time I was leading a two-day strategic planning retreat. Time to get serious.

The retreat was eye-opening, introspective, and invigorating. Since the 16 participants had known and worked together in some capacity for years, I assumed that we would share similar perspectives of our organization's history and future. Turns out, not so much.

After living with the process for months and riding an intellectual high from the success of the retreat, I had a hard time leaving the concepts of strategic planning behind. That's when I thought, why stop with my business endeavors? Why not apply the principles to my life?

I am just like you – I want a good work life balance, I want to embrace my role as a legal ambassador, but I want to leave the profession on my terms and have a plan for my next great life. If you do too, then I have some ideas to share. Strategic plans are meant to be individualized and personal. So, if you are ready to be strategic about your life, incorporate the ideas that apply to your life, your family, your situation, and abandon without guilt those that do not apply.

- ***It's all about health and happiness.*** The two goals go hand in hand. Buy a piece of poster board or use the backside of your child's science project and make this chart:  
Health and happiness chart



It's an easy way to organize your thoughts.

- ***It's all inclusive.*** If you are single, yay for you! Proceed to #3. If your life involves other people, those people are instrumental to your life plan and should be a part of this process. For example, if your parents just moved in with your family, their health and happiness are part of the big picture. Since family dynamics are tricky, some experts suggest that you start the family strategic planning with a family survey. It does not have to be long. Example questions include:
  - If you could change one thing about our family home, what would it be?
  - Would you like to move in the next five years? If yes, where? Why?
  - How would you change something that the family does or buys to save for a vacation that you really want?

Children of all ages should be included in this process. When given an encouraging atmosphere to brainstorm everything from the silly to the serious, your child's vision may remind you and inspire you to dust off all your dreams.

- ***Focus on the future, let go of the past.*** While it is important to learn from past experiences, it is not helpful to dwell on past situations, especially if it makes a family member feel defensive. Instead of rehashing why the last family vacation was a disaster, explore what type of vacation would generate the most happiness and satisfaction of family members.
- ***Speaking of the future, don't look too far ahead.*** Most experts say that a strategic plan should cover 3 to 5 years. Stretching your family strategic plan beyond five years would likely fail to incorporate all the ebbs and flows, changes and challenges that family goes through. If the family really liked this process, you can meet annually to tweak the plan.
- ***Your family's strategic plan should follow the SMART concept: specific, measurable, achievable, realistic, and time-bound.*** Financial goals are measurable and including a timeline or markers for reaching financial goals will improve the success of your family's plan. While happiness is more difficult to quantify, using a timeline will generate a SMART goal. For example, if a family member is unsatisfied with her current employment, setting a timeline for that person to take personal time for researching vocational classes, online tutorials, meetings with mentors, will help keep the family member on track.
- ***The plan needs buy-in.*** In my family, a strategic plan was created and every family member was given a copy for review. Each family member returned the plan with suggestions or affirmation of the plan with a signature.
- ***Once the final edits are complete, let each family member pick one or multiple goals.*** The challenge is thus – capture your goal in a single word or illustration. In my case, ClipArt was my savior since I have no artistic skill. The keywords and illustrations were glued onto a poster board, which we laminated and hung it in the family room for inspiration and reminder. This concept is similar to vision boards that were popular several years ago.

Congratulations, you have created a vision board for your family! Go celebrate with ice cream and good luck with the plan.

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Dana Hoffman is a litigator, advisor and defender of the transportation, long term care and electric industries. As a litigation team member at Young Moore and Henderson since 1990, Dana has evolved her law practice from the defense of automobile cases for insurance companies to complex defense litigation for motor carriers, nursing homes, and rural electric cooperatives. Dana enjoys planning her professional and personal lives and she hopes this article encourages you to do the same.

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