

# **STRATEGIC PLANNING PARTNERS**



# **STRATEGIC PLANNING**

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# **PARTNERS**



Dear Strategic Planning Partner workshop attendee:

Congratulations! The work that you have done to bring you to this point is extraordinary. We hope that you celebrate this success and recognize both your achievement and enormous potential.

Strategic Planning Partners has developed the Strategic Planning Workbook to assist artists with their life, career, and project goals. The workbook incorporates and adapts productivity, time management, goal setting, money management, and satisfaction exercises common in business and personal management to the needs of the artists. The worksheets and evaluation exercises present an opportunity to articulate and understand your unique personal goals and to develop clear strategies for achieving them.

We have every confidence that the results will exceed all your expectations. Thank you for participating in this program.

Colleen Keegan



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## **The Strategic Planning Partners Strategic Planning Workbook Introduction**

The sets of exercises in this workbook clarify where you are and where you want to go. They formalize individual goal setting, time management, and financial planning; and become the basis for an action plan. They are intended to provide an opportunity to listen to yourself without judgment. There are no right or wrong answers, length requirements, or restrictions. The exercises should be written to yourself for yourself.

The initial time management and financial exercises are intended to provide an accurate picture of your current reality in order to make changes for greater freedoms and rewards. Be accurate and nonjudgmental in these exercises.

You can evaluate your completed workbook exercises by using the techniques outlined at the end of each section. This will assist you in developing your action plan.



## **Goal Setting**

Nothing is as consistently and effectively motivating as moving toward a goal that you want and that you can see. Writing a clear picture of both your short-term and long-term goals will help you clarify your priorities and enable you to create strategies for realizing your dreams. Have fun with these exercises and allow yourself to be specific with each picture. Note where you are or what you are wearing, how you feel and what you are doing. Do each exercise twice. Quickly record your initial response. Then evaluate and refine the picture, tailoring it to your unique vision. There is no right or wrong here, or anything to hold you back. Make your pictures big and bold.









## One-Year Priorities

Prioritize your One-Year Goals and list the three that are the most important.

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**B.**

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**C.**

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## Three-Year Priorities

Prioritize your Three-Year Goals and list the three that are the most important.

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**A.**

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**B.**

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**C.**

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## Action Plan B

Develop an Action Plan for your Three-Year Goal B.

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## Five-Year Priorities

Prioritize your Five-Year Goals and list the three that are the most important.

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**B.**

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**C.**

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## Ten-Year Priorities

Prioritize your Ten-Year Goals and list the three that are the most important.

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**B.**

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**C.**

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## Lifetime Priorities

Prioritize your Lifetime Goals and list the two that are the most important.

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**A.**

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## **Goal Setting Evaluation**

Congratulations. You have taken an important step for yourself. The act of recording goals is in and of itself extremely and absolutely beneficial. It informs thoughts and actions and almost inexplicably affects outcomes dramatically. Management and behavioral scientists have now studied the phenomena for over thirty years and have reached consensus that the efficacy of the act of recording goals even transcends differences in methodology, purposes, and participants.

Your goals will serve as an important and empowering context for your work and your life. You can stop now or you can further utilize your workbook by following the simple process outlined below.

### *Evaluation Process*

#### Evaluating Your Goals

- Wait at least seven days after you have completed your goal statements before evaluating them.
- Read the Obituary first and ask yourself if these goals are what you truly want.
- Eliminate any “Shoulds.”
- Ask yourself if your goals are ambitious enough. There is no reason to limit yourself in any way. You have demonstrated extraordinary ability and anything that you truly want is possible.
- Look at your word choices and replace passive or equivocal verbs (“might,” “try,” etc.) in your text (and in your vocabulary).
- Read the One-Year Goals and notice whether they serve your Lifetime Goals.
- Review the One-Year Goals and question why they need to be completed within a twelve-month period. Move at least two of your objectives to the three-year plan.
- Read the Three, Five, and Ten-year plans and note their relevance to the Obituary and to the One-Year plan.

- After you've read and evaluated the Time Management, Likes and Dislikes, and Financial sections of the workbook using the steps outlined at the end of each section, return to this section and re-read your One-Year Priorities.

### Evaluating Your Action Plan

- Review the actions that you have previously taken to reach your One-Year Goal A. Note what has been effective and what has been frustrating.
- Outline a course of action that slightly modifies past approaches.
- Break down the actions into 12 (monthly) increments. Write the plan and include it in your notebook.
- Reference the plan monthly and expand or modify it according to your experience.

## **Time**

Time is everyone's greatest resource and often their greatest mystery. Getting an accurate picture of how you use your time will enable you to make small changes that will radically increase your productivity and satisfaction. Managing your time will enable you to work SMARTER rather than HARDER. Log your time for a two-week period to get an accurate picture of how you are spending your days and how much time individual activities really demand. The record will enable you to project more accurately, time shift for greater productivity, and schedule more effectively.



# Time Tracking

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## Week One/ Day One

Activity	Time Spent

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## Week One/ Day Two

Activity	Time Spent

*Log your time for a two-week period.*



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**Week One/ Day Three**

Activity	Time Spent

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**Week One/ Day Four**

Activity	Time Spent

*Log your time for a two-week period.*

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**Week One/ Day Five**

Activity	Time Spent

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**Week One/ Day Six**

Activity	Time Spent

*Log your time for a two-week period.*

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**Week One/ Day Seven**

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<u>Activity</u>	<u>Time Spent</u>

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**Week Two/ Day One**

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<u>Activity</u>	<u>Time Spent</u>

*Log your time for a two-week period.*

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**Week Two/ Day Two**

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<u>Activity</u>	<u>Time Spent</u>
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**Week Two/ Day Three**

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<u>Activity</u>	<u>Time Spent</u>
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*Log your time for a two-week period.*

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**Week Two/ Day Four**

Activity	Time Spent

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**Week Two/ Day Five**

Activity	Time Spent

*Log your time for a two-week period.*

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**Week Two/ Day Six**

Activity	Time Spent

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**Week Two/ Day Seven**

Activity	Time Spent

*Log your time for a two-week period.*



## **Time Tracking Evaluation**

### *Evaluation Process*

- Read your time charts and note the surprises. Make a quick analysis of time expenditures and reward or satisfaction.
- Experiment with shifting activities to increase productivity and eliminate unnecessary busyness.
- Schedule significant down or relaxation time in every week. It is essential to both creativity and productivity.
- Schedule a fifteen-minute meeting with yourself every week to review your priorities for the next seven days and your challenges and accomplishments during the previous period.
- At the end of every day note something large or small that was positive about the day.





## **Likes & Dislikes**

There will always be aspects of work that are unsatisfying or difficult, but they should be minimal and inconsequential in relationship to the rewards of your efforts. Listing your specific likes and dislikes and strengths and weaknesses is an important opportunity to listen to yourself. It will provide a basis to evaluate current work; maximize your strengths; and address, manage, and overcome your difficulties. Don't over think the listing exercises. Write down the first things that come to mind, then consider them more carefully when you go back and prioritize.

No one starts a career at peak efficiency. Skills and strategies are learned and there are techniques for eliminating or minimizing the impact of every weakness. Don't be hard on yourself with this exercise. Focus on what you have achieved in spite of your obstacles and imagine the joy of working without your greatest impediments.



## Likes and Dislikes

Art Practice

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### Likes

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- 1. List what you like **most** about your experience with your art practice.*
- 2. Number your list in order of importance.*

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### Dislikes

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- 1. List what you like **least** about your experience with your art practice.*
- 2. Number your list in order of importance.*

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## Likes and Dislikes

Art Practice

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**Best**

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*List specifics about your **best** art practice experiences.*

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**Worst**

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*List specifics about your **worst** art practice experiences.*

# Likes and Dislikes

Art Practice

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## Strengths

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*List your art practice **strengths**.*

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## Weaknesses

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*List your art practice **weaknesses**.*



## Likes and Dislikes

Work

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### Likes

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- 1. List what you like **most** about your other income-generating work.*
  - 2. Number your list in order of importance.*
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### Dislikes

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- 1. List what you like **least** about your other income-generating work.*
  - 2. Number your list in order of importance.*
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## Likes and Dislikes

Work

**Best**

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*List specifics about your **best** work experiences.*

**Worst**

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*List specifics about your **worst** work experiences.*

## **Likes and Dislikes**

Work

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**Strengths**

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*List your professional **strengths**.*

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**Weaknesses**

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*List your professional **weaknesses**.*



## **Likes and Dislikes Evaluation**

Stop being hard on yourself. It is not merited and does not work. Every artist who has entered this program has aggrandized their weaknesses and downplayed their strengths. Understand that you are capable of success beyond your expectations. CELEBRATE your achievements. It will allow you to demystify and address your inefficiencies.

### *Evaluation Process*

- Fortify your strengths by fully acknowledging their value. Make a list of large and small rewards and a schedule for receiving them based on your accomplishments.
- Identify the perceived weaknesses that compromise your work or your satisfaction. Isolate one and change it. Let go of the idea that there is anything that you cannot do and that you have to be great at everything. You have been successful in spite of your perceived limitations. You are fully capable of addressing and conquering any weakness.
- Preface thoughts and statements about your perceived deficiencies with the phrase, "Up until now." For example, "Up until now I have not been good with money" or "Up until now I have not been comfortable in work related social situations."
- Create an action plan based on very small steps and the absolute belief that you can achieve proficiency in every area of you life.



## **Financial**

Money is often a tortured subject for artists. It is fraught with value judgments, anxiety, misperceptions, and misinformation. Artists commonly distance themselves and their focus from money and ironically, become hostages to their finances. Money is only money. It is not GOOD or EVIL but it will control you if you do not exercise control over it. Money management is both simple and learned.

Decide now that this is a new beginning. Disregard any idea that you cannot effectively manage money or that you are not good with money. Understand that with good information and support you are fully capable of financial freedom.

Getting an accurate picture of your current expenditures and income is essential to making decisions that will frame your future. Record your expenditures and incomes without judgment, then create realistic personal and professional budgets.







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**Week One (continued)**

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**Expenditures**

Description	Amount

**Revenue**

Description	Amount





## Financial Tracking – Monthly

Month One	
Expenditures	
Description	Amount

*List all your expenditures and revenue for the previous two months utilizing check and credit card records, memory and estimates.*

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**Month One (continued)**

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**Expenditures**

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Description	Amount

**Revenue**

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Description	Amount

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**Month Two**

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**Expenditures**

Description	Amount

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**Month Two (continued)**

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**Expenditures**

Description	Amount

**Revenue**

Description	Amount

## Yearly Budget

Expenses			
	Description	Budget	Actual
Mortgage / Rent			
insurance			
Utilities			
electric			
gas			
water			
cable			
Phone			
office			
home			
cell			
Automobile			
payment			
insurance			
repair and maintenance			
fuel			
garage			
Transportation			
Medical			
insurance			
treatments			
medications			

*Create a budget that includes all expenses and projected revenue.*



**Expenses**

	Description	Budget	Actual
Dental			
insurance			
treatment			
Food			
Clothes			
purchase			
laundry			
Savings			
retirement			
general			
Debt Service			
student loans			
credit card			
Entertainment			
non-reimbursable business			
personal			
Travel			
non-reimbursable business			
personal			
Research Materials			
books			
subscriptions			
services			

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**Expenses**

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	Description	Budget	Actual
Equipment			
purchase			
maintenance			
insurance			
Gifts			
business			
personal			
Misc.			
Other			

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**Revenue**

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	Projected	Actual
1.		
2.		
3.		
4.		
5.		
6.		

*Create a budget that includes all expenses and projected revenue.*







## **Financial Evaluation**

### *Evaluation Process*

Read through your expenditures without judgments.

Look at each personal and professional allocation and determine whether these are truly valuable to you. Are they worthwhile and SUFFICIENT? Note the areas where increasing your expenditures would provide a greater return or satisfaction. Abandon the scarcity model and allow yourself to imagine greater freedom and abundance.

Identify areas where inefficiencies or habits are compromising your financial freedom. Decide to reduce these expenditures by 20% over a six-month period. Track your progress and reassess your goal at the end of this time.

Look at your revenue entries and determine the percentage of time each income source represents. Determine how and when you can increase compensation from each activity.

Look at income related to your artwork and consider your options for increasing your revenue. This could involve getting new or additional gallery representation or applying for additional grants or fellowships. Make a step-by-step plan outlining specific activities.

Pattern success by finding information and examples, and develop your plan accordingly. Seek information and advice with confidence that you will be successful.

Develop a plan that incorporates CONSISTENT but MINIMAL effort. Allocate 45 minutes a week to pay bills and review your finances.

Look at how you generate income and determine if it serves you well. If the compensation is insufficient to your time and effort, decide how and when you will change the income or the job.

It is vitally important to discuss your compensation with your employer at least once a year. Investigate the market value for your services and prepare a list of your responsibilities and contributions. Determine the rationale for a salary increase and rehearse your presentation. Focus on your job, your value and the market. Never apologize or personalize. You will either get a raise or an explanation that will be invaluable to you. If the company or industry is rocky and your job is supporting other priority activities

you should start exploring other possibilities. If your employer does not think that your performance merits an increase in pay, use the opportunity to explore his/her criteria for greater compensation.

Financial proficiency is **LEARNED**. Talk to people who have been successful monetarily and get advice and referrals to bankers, brokers, etc. Read books and articles and research topics through the internet until you reach a comfort zone. Then plot a course of financial action that will facilitate your goals and reward your achievement.

Celebrate all your financial gains and successes; it will reinforce positive behavior and make the process enjoyable.