

How
to have
a personal
STRATEGY
for **IMPACT**



Steve Patty, Ph.D.



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You have some dreams and desires for your life, no doubt.

Maybe a few of them have to do with experiences you want to have (like hiking in the Swiss Alps), skills you want to acquire (like learning how to play the guitar), or goals you want to achieve (like writing a book or securing a promotion). You've probably already fulfilled some of them. Others might seem frustratingly elusive and far too distant.

Aspirations propel us forward. They get us up in the morning and keep us moving along our paths when the going gets tough. Without vision, we perish a little every day. We need purpose to fill our lives with meaning.

Maybe some of your purpose has to do with the people in your life—your family, friends, colleagues, neighbors. When you think about your personal legacy, you realize how you want to positively influence those around you. You want to make a difference in others—a good and durable difference. And perhaps especially, you want to positively impact those closest to you.

There is a way to be intentional about the people-oriented part of your life's strategy.

Developing strategy for the people part of our lives takes some thought, though. It usually doesn't just appear overnight or out of nowhere, even though the desire is innate in most of us. Thinking strategically is hard work. But it's not rocket science. A little thought, if it is quality thinking, goes a long way.

Strategy requires us to think about what will direct our actions, guide our plans, characterize our engagement with others, and shape our future and futures of those closest to us. It means that we need to consider what is driving us and toward what end in others.

Without strategy, we're too often left to

- react to people instead of engage them purposefully,
- miss opportunities for impact instead of making the most of them,
- get distracted by circumstances instead of staying focused on influence, and
- fill our lives with activity instead of use our lives to make a difference in others.

It's possible to think intentionally about our life's effect on others. It's possible to develop a strategy for the impact. And if you have already done some thinking about your life's effect, it's usually possible to do it a little better.

A way of thinking about strategy is proposed here—five steps to guide us through the five key categories of strategic thinking and planning. Take your time with this process. Good ideas usually come through iteration. Try out your ideas on people whose wisdom you respect. Work them out with those closest to you—your spouse, significant others, or friends. Let this be an expression of you, but let the process push you as well.

We will use the Dialogue Boxes™ to frame our thinking. And we will take these in an unlikely order, starting with Box C –Intended Impact, then Box A—Ultimate Aims, Box B—Premises, Box D—Best Means, and then on to the plan of Box E—Action.

Are you ready? Here we go.

The Dialogue Boxes Model

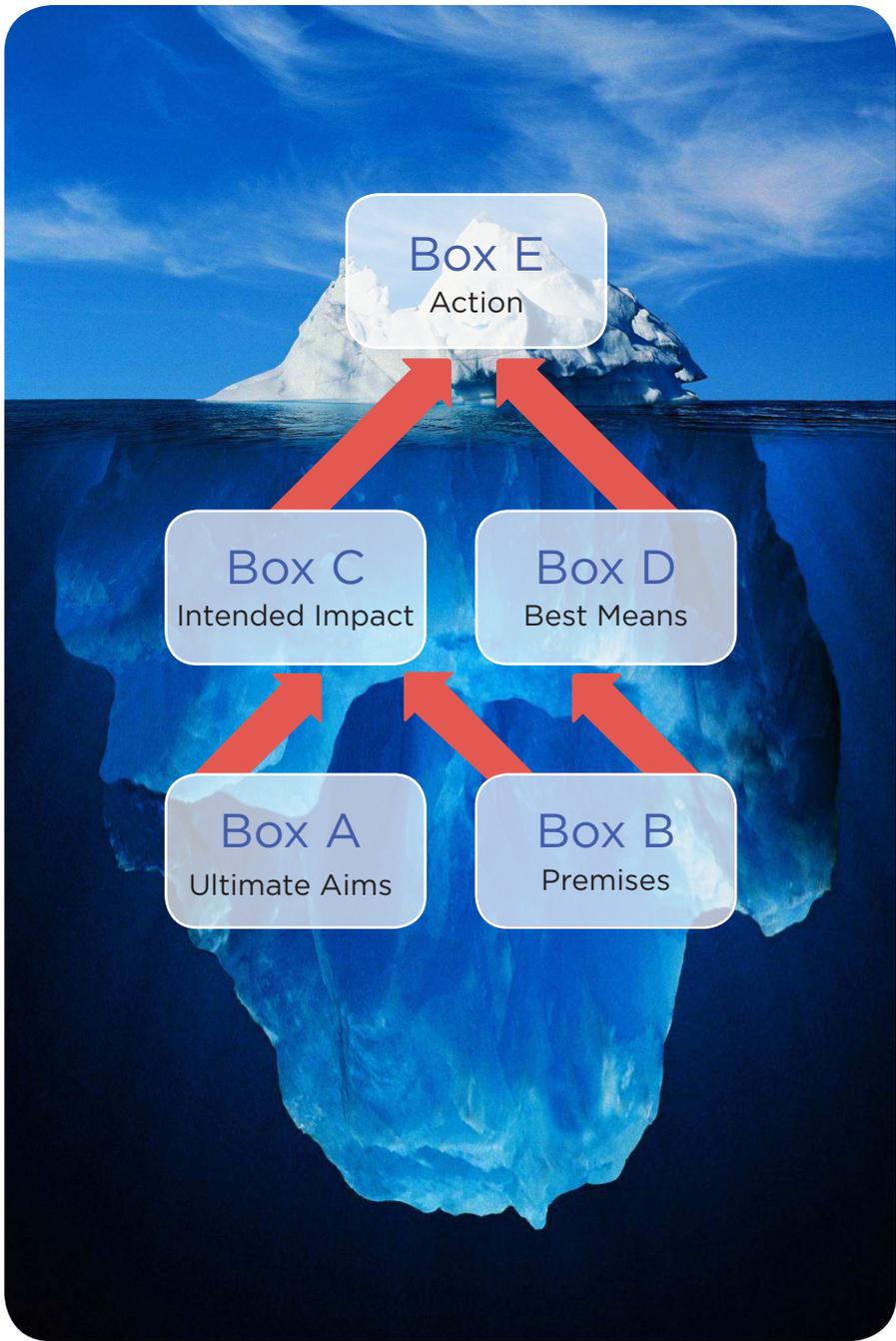
We are going to use the metaphor of an iceberg to illustrate how the actions of a person (what is done and said, or not done and not said), are expressions of something much bigger. The “much bigger” parts are ideas, strategy, intentionality, values, beliefs, assumptions (good and bad), hopes, dreams, expectations, methods, and such.

Actions are the tip of the iceberg. Strategy is everything below that tip making it so. There's much about the under-the-surface parts of our iceberg that helps our actions be more or less effective. If we can give those ideas below the surface of the water attention, if we can develop them and articulate them so that we can be intentional about them, we will be able to be more strategic about our lives. We will have a chance at have more impact in those we care about.

This diagram will show the components of a strategy superimposed on our iceberg. (see page 4)

Box A holds your **Ultimate Aims**. This box is about your personal ethic and essence. It is how you are determined to show up in your life at this moment and in every future moment, regardless of what life throws at you.

Box B is about your **Premises** that guide you. These are the key ideas that orient you and explain what's important to you. They are usually premises of context (what you believe about yourself, others, and the world around you) and premises of core convictions (what you believe to be most true, most valuable, and most virtuous).



Box C is your **Intended Impact**. This is what you hope will be the effect or influence or achievement of your life in the lives of others.

Box D is your **Best Means**. This box captures your theory of engagement and your theory of change. It is how you think people best change, grow, and develop into the kinds of people you envision they might become.

Box E is your **Action**. This is your game-plan. Based on your strategy, it's what you intend to do.

Even though the flow of ideas goes from A and B, through C and D, and then determining E, we are going to begin our work with Box C - Intended Impact and then think through Box A—Ultimate Aims, Box B—Premises, Box D—Best Means, before getting to Box E—Actions.

Box C - Intended Impact

Intended Impact is the effect of your life on the lives of others. This is the legacy you will leave in the people you care about. It is how those in your sphere of influence will be different because they have been touched by your life. When you think about the part of your life's mission that has to do with people, you will likely be thinking about the high-level ideas of Box C - Intended Impact.

It's helpful to consider a few characteristics of a good Box C - Intended Impact:

- Box C is about others, not about you. Boxes A and B are more about you and how you show up. And Box E is about what you will do. But Box C is about the impact of your life. Keep it about what others will look like and how others will be changed because of you. Instead of writing about you, make Box C about them—your family, community, neighborhood, company, church, or other body of people.
- Box C is best when the big ideas are few and compelling. Think simple and elegant. You will want to be able to hold these ideas in your mind and keep them in focus. Otherwise, they will be of no practical use to you.

- It's fine to have Box C be about your current stage of life. Don't worry about writing something comprehensive to covers your whole life or you'll likely get overwhelmed. Just consider your present stage of life, or the one facing you next, or maybe even just a segment of your current life (like your family, or your career).
- Give some thought to what might be indicators of this impact that you seek to have in others. Indicators help us evaluate whether or not we're making progress as time goes on. But they will also help us define what we mean by intended impact and keep our ideas from becoming fantasy or hyperbole.
- If you want to get even more specific, think about what people will know, feel, and do because of your influence in your life. You should be able to list and enumerate these. They often come in a tangible, specific, or quantitative form. But it might also be able to describe the deeper indicators—what you might see if they believed, loved, or became something different because of you. These will come in a less specific but equally significant qualitative form.

Try this	In service to... My children having gained an expansive view of the world and an appreciation for different cultures.
Not that	In service to... Regularly taking family members on trips abroad.
Why?	Box C is about the impact of our action, not the action itself. If we define our plan or program for Box C, we might miss seeing the different ways available to achieve our intended impact. In addition, trips abroad, if they are not intentionally designed, may do little to achieve the impact intended.

Try this	In service to... Those on my team are equipped to make progress on their “growing edge” and are able to become self-learners.
Not that	In service to... Those on my team being all they can be.
Why?	The second option is too vague to be a productive Intended Impact. The first option is high-level and require some build-out to be useful, but it defines the particular area of impact, and that's helpful for Box C.

These questions will help to guide your thinking:

- Who are the main people or groups of people in your life?
- What kind of development (they will grow in this), or state (they will experience this), or characteristics (they would learn or exhibit this) would you most like to see in them?
- What parts of that vision for others do you intend to influence or help accomplish?
- How would you see that kind of progress becoming realized?

Watch out for...

A Box C that is too ambitious—this is the “world peace” effect, when we strive for something so massive and aspirational that it has no practical value for planning a strategy for living.

A Box C that is too indirect—when we want to affect something that is too far afield of our influence or that depends more directly on the influence of someone else.

A Box C that is too complicated—when it holds too many ideas for us to keep in front of us or guide our thinking every day.

A Box C that is too vague—when we use words and ideas that are so sentimental that we don't know what they mean or can't tell if they were to be achieved even in part.

A Box C that is too insignificant—when we fail to value the difference we can make in the lives of others.

Box A – Ultimate Aims

Your Ultimate Aim is a commitment that you make about how you will show up in this moment and in every future moment. This is your personal ethic. It is who you need to be in order to have the kind of life you want and the intended impact in others that you desire. You'll never perfectly live your Box A, but it's still important to articulate as an aim. It's the kind of thing that you will remind yourself constantly. When you are exhausted and stressed and discouraged, or when you are filled with vigor and confidence and success, this is how you tell yourself to show up. This is the standard you hold yourself to. We usually begin Box A statements with the phrase "In all things" to keep us thinking about the pervasive and ever-present nature of our Box A – Ultimate Aims.

There are three qualities to a good Box A – Ultimate Aims:

1. Box A should be **immediate**. It should be a way that you can be right now. You can wait and work a long time to achieve a Box C – Intended Impact, but you can't wait to show up. You show up now. Make sure your ideas of Ultimate Aim are ones that you could exercise in any situation and at every moment.
2. Box A should be something **you have control over**. This is the sovereignty feature of an Ultimate Aim—you shouldn't have to depend on the responses of others to show up like this. It should be the kind of thing that you can do even if others around you don't.
3. Box A should push you or hold you to a **high standard** that you might tend to lose or miss if you don't pay attention. If you are thinking of something that already comes naturally to you—your default way of "showing up"—then you might not need to write it as your Box A. If it comes naturally and is extremely important, go ahead and state it in your Box A. But be sure to push yourself as well. Include a key idea or two that will require you to be the best you can be and maybe even grow in ways you currently feel fragile.

Try this	In all things... I will treat people with dignity.
Not that	In all things... I will gain the respect of people.
Why?	We can control how we treat people, even those who mistreat us. But winning the respect of people as a Box A will make us chasing the opinions of others. We will be able to influence those opinions, but those are out of our control.
Try this	In all things... I will be honorable, respectful, and loving to the people around me.
Not that	In all things... I will leave my mark on the world.
Why?	The second option is vague, excessively aspirational, and focused on an effect, not an essence. In addition, the first option is immediate; the second option is not.

Here are some questions that might help:

- What kind of person do you need to be to have the impact in others you intend to have?
- What do you say to your own heart when you are struggling to show up like you want to show up? What do you keep reminding yourself about who you need to be?
- If people were to talk about you in your absence, what would mean the most to you about their observations about the kind of person you are?
- What are the intangibles about how you want people to experience you? In other words, what do you want people to feel and experience about you even if they can't quite explain it clearly?

Watch out for:

- A Box A that has too many ideas—when you have so much in Box A that you can't keep a clear mind about what's most important.
- A Box A that doesn't challenge you—when you state something second nature to you instead of something that pushes you to be a better you.

A Box A that depends on the response of others—when you forget that your Ultimate Aim is about how you will face every situation regardless of whether or not others agree or cooperate with you.

A Box A that is easily forgettable—when the words you use are so bland or inert that they don't hold meaning and power for you.

Box B – Premises

Premises are the beliefs that guide you. Beliefs usually come in two forms: (1) beliefs about context and (2) beliefs about core convictions. Your beliefs about context are your perceptions about your abilities, stage of life, resources, interests and passions, training, support systems, opportunities, etc. It's helpful, when designing a life strategy, to name your assumptions about your context and see if what you are assuming is actually correct and helpful. Your beliefs about **core convictions** are the ideas to which you are dedicated and which will keep you on course. These ground you. They keep you on course when you can no longer see straight. They help you cut through the clutter and orient you to what's most important. You need to state these so that your life's strategy is guided by your best and highest ideals.

When you articulate your premises of **context**, keep this in mind:

1. Think through what you tend to assume about your circumstances that might not be true. Then, state what you know to be the correct perspective about your context. Remember, this box is about premises. Your key premises of context will keep you from misleading yourself or stubbornly clinging to what you know is not true.
2. Name that which will orient you rightly to yourself, your resources, your opportunities and challenges, the needs and growing edges of those you intend to impact, and the shifts in people and contexts that you might inadvertently overlook. These will help you apply yourself strategically.

When you describe our premises of **core convictions**, remember:

1. Keep your ideals to a handful or so in number; it's hard to remember more.
2. The best core convictions are ones that will cost you something to believe. These help you stay the course when you might be tempted to let down or let go. They require you to lean into your life productively even when you don't feel like it.
3. Try to state them simply and memorably. They should have enough of a ring to them that they will slip off your tongue in conversation and run loops in your mind effortlessly. Wording is important.
4. If you have some time, think about what beliefs you might believe that you don't intend to believe or don't want to believe. Most of us have adopted a belief or two that has crept into our heads unannounced and unexamined and are now wreaking havoc in our best-laid plans for strategic living.

Questions to help you think it through:

- What do I commonly assume about my setting and circumstances that has proven time and again to be faulty thinking and that compromises my ability to deploy myself in service to my intended impact? (context)
- What do I need to be clear about regarding my context if I'm going to lead my life well? (context)
- When I lose my bearings and get distracted or wasteful with my life, what key beliefs am I forgetting? (core convictions)
- What ideals do I need to remind myself about in order to have the most meaningful life I can live? (core convictions)

Context

Try this	Guided by the idea that... Those in my life deserve the best from me.
Not that	Guided by the idea that... The younger generation won't value what I have to offer.
Why?	The second option is an unhelpful assumption. All evidence might seem to indicate that the belief is true, but this is a rather assumptive generalization and tends to be self-fulfilling. Try to state accurate premises about context that challenge your assumptions and orient you correctly.

Core Convictions

Try this	Dedicated to the idea that... Every life is a stewardship.
Not that	Dedicated to the idea that... People are good.
Why?	Pay close attention to what you say in your Core Convictions. You might be tempted to write statements that sound nice, but that you don't believe exactly. Try to render the exact version of those ideas. This one, for instance, could be rendered "Everyone has the capacity for good" or "It's always best to see the good in people" rather than implying that all people are all good all of the time. There is something powerful about stating the more precise version of this conviction.

Watch out for:

A Box B (context) that is irrelevant or out of date—when you are referencing your hopes, dreams, or memories instead of reality.

A Box B (context) that is assumptive—when you project your own ideas on the context instead of seeking truly to understand it (or others) as clearly and honestly as you can.

A Box B (core convictions) that is too complicated or forgettable—when you write beliefs you'll probably never remember clearly.

A Box B (core convictions) that doesn't demand much from you to believe—when you state the easy things instead of the things that will challenge you and strengthen your resolve.

Box D – Best Means

Your best means are what you believe will best cause the impact you intend. We often call these theories of change. They are ideas not exactly about what we do, but about the principles behind the practices that cause people to grow, to develop, and to experience impact the best. Think about what kinds of things are the best catalysts for impacting people, and then extract the principle or characteristics to explain their success. A “means” is a way, a path, a strategy, an approach. But when you think about best means, don't think about the action. Instead, consider what makes the action effective for change. Those principles will be your best means.

What makes a good Box D – Best Means?

1. Describe principles, not practices. This will help you identify the kind of things, or the characteristics of things, that make a difference in others. If you identify practices here, you won't be able to think creatively about other possibilities for your Box E – Action that could be equally productive. You'll be stuck. If you describe principles, you will be able to press that principle into all of your actions and create other actions you haven't yet considered.
2. Keep your focus on the “best.” It's tempting to describe what you prefer, or what comes easily, or what is convenient. If you can describe what is best, you will be able to push yourself to be increasingly strategic in your action instead of simply taking the comfortable course.
3. Keep the number of your Box D ideas limited to a handful or so. As with the other boxes, it helps if the ideas are simple and memorable enough to be able to hold in your active memory.
4. Finish the phrase, “Whatever I do will not have the impact I intend unless it (or, until it)....”

Questions to help:

- What kinds of experiences make people grow and develop best? What are the best engines, catalysts, and levers of true change?
- What has helped you to grow in the areas you seek for others, and what about those experiences were most powerful and efficacious?
- What does research say helps people the best in the areas of your intended impact?
- What might be some “cherished theories” that you hold about how people are impacted, but that probably are more about your hopes and assumptions than reality?

Try this	Through... A constant drip of learning and challenge over time.
Not that	Through... A meeting once a week.
Why?	We need to identify the quality of the action and in the action that makes growth happen, not simply the action.
Try this	Through... Personal and meaningful experiences which are given meaning through guided reflection.
Not that	Through... Relationships.
Why?	In most cases, the idea of “relationships” is too vague to be helpful. If we were to say what kind of relationships—like a mentoring relationship, an accountability relationship, or a confidante relationship—we would be getting closer to identifying the key best means.

Watch out for:

A Box D that is more about the tactic than the strategy—when it is more about what you do than why the actions you choose work so well to achieve the outcome in others.

A Box D that is too vague—when the ideas are so general that they won’t make a difference in what you choose to do and how you choose to do it.

A Box D that can only be applied narrowly—when there are few implications instead of many.

Box E – Action

The action of Box E is the plan for your next steps. This is what you will do. The key to making Box E intentional is to be disciplined about connecting your Box E – Action to your Box C – Intended Impact and your Box D – Best Means. Your action should be in service to your intended impact and characterized by your best means. It usually takes a bit of work and a couple of iterations to make it more in service to Box C and more characterized by Box D. Think through all of your ideas of Intended Impact to ensure you have a plan to achieve each. And then think through each of your ideas of Best Means to see if there might be other adjustments or modifications to your plan. The better your plan expresses C and D, the more powerful your action will be.

What makes a good Box E – Action?

1. A Box E should be tangible and actionable.
2. Sometimes it is helpful to think about next steps in Box E if it feels overwhelming to do a full and comprehensive plan. Designing a trajectory of “steps from here” can be very strategic.
3. This is the box where we attach timelines, benchmarks, and points of accountability. A plan is only as good as its execution, so think through how you will need to lead yourself to execute your plan.
4. It’s usually good to include a few experiments in Box E that will push you into new frontiers. Experiments are small, contained, quick actions which yield data about what works and what doesn’t work. They also tend to help us try something scary, since they are only experiments and not full-blown programs. It’s okay for an experiment to fail if we learn something from it that we can apply to later action.
5. Box E should be an expression of the other boxes, and most clearly of Box C and D.

Try this	I plan to... Have coffee once a week with someone at work outside of my normal sphere of relationships.
Not that	I plan to... Do better at talking to people at work I'm not close to.
Why?	It's important to design something tangible and actionable, not just a hope or intention.
Try this	I plan to... Write a personal note of vision and encouragement to each of my key staff members every quarter.
Not that	I plan to... Be seen as the best supervisor by my team.
Why?	The best Box Es are actions which will enhance, increase, or amplify a certain kind of impact in others. This example is vague and tending toward narcissism.

Watch out for:

A Box E that justifies everything you currently do—when it fails to push you to better actions.

A Box E that is too ambitious—when you forget about the realities of Box B (Premises of Context) and design something you'll never fulfill.

A Box E that is too complicated—when you don't think about the "next steps" and instead plan to do the most ideal (and often most overwhelming) right away.

A Box E that doesn't sound like fun—when it looks more like duty and obligation instead of interesting and enjoyable to try.

A Box E that is too safe—(the aforementioned statement notwithstanding) when it doesn't give you a bit of a rock in your stomach when you think about it, because most steps of real courage or growth require something more from us than we are usually comfortable giving.

Box E
Action

Box C
Intended Impact

Box D
Best Means

Box A
Ultimate Aim

Box B
Premise

