Short-Term Long-Term Strategy

**** This following exercise was taken from GLA - Online Leadership Learning Program at In Our Shoes (i.e. ALL-ACCESS Pass included with every coaching program. Schedule a call to learn more: school@inrshoes.com.***

Leverage this exercise when you need to communicate buy-in or draw out the short and long term visions for your clients. You can also use this to springboard a discussion with your partner and/or team. Divide what you know needs to happen in a new role you are targeting into two parts: a short term and a long term plan.

Short Term Planning - This is the tactical, one year or less plan that's REALISTIC, not what *should* be done because enough BUDGET, TIME and RESOURCES are not on your side. Group them as high-level initiatives relating to at least one benefit. In other words, what will you gain from this? What's the benefit / result of each initiative?

Example:

Short Term Initiative: Train John on XYZ, because he's a quick learner and has excellent communication skills. Have him train others in the department.

Benefit: A train the trainer model saves money and places ownership on the team to be aligned with all requirements. This model also fosters collaboration. We can start with a pilot group and roll out to larger audience from there.

Short Term Initiative 1 ______________________________ Benefit________________________

Short Term Initiative 2 ______________________________ Benefit _________________________

Short Term Initiative 3 ______________________________ Benefit ______________________________

Short Term Initiative 4 ______________________________ Benefit ______________________________

Long Term Planning – This is the end-game, right way of doing things which the Short Term plan will set the stage for. Assume all the stars are aligned and that's what you are working towards. Don't get caught up in the HOW and all the details here. Write down all of the top-level initiatives that should happen in the long run after the short-term approach is complete.

Example:

Long Term Initiative: Formalize a Firmwide Training Curriculum. Self-Paced and On-Demand Rollout scalable for thousands of employees with community feedback.

Benefit: Contributes to a COE – Center of Excellence. Aligns with company strategy of eliminating department silos.

Long Term Initiative 1 ________________________________ Benefit _____________________________

Long Term Initiative 2 ________________________________ Benefit______________________________

Long Term Initiative 3 ________________________________ Benefit_______________________________

Long Term Initiative 4 ________________________________ Benefit_______________________________

Now create a one slide presentation and divide the page in half. Taking the above initiatives, write down a couple of bullets on what needs to happen to accomplish each side of the house: Short Term vs. Long Term. Memorize this too and have these in your hip pocket when you start talking to people. Enjoy this!

Short Term	**Long Term**
• This needs to happen	• This needs to happen
• Then this needs to happen.	• Then this needs to happen.
• Then this needs to happen.	• Then this needs to happen.
• Then this needs to happen.	• Then this needs to happen.

Memorize these short and long term initiatives and start self-promoting them. This is your GAME PLAN. This is the worker bee broken out of her shell and stepping up to play a bigger game. Given all of your experience, lessons learned, and know-how you have gained, you are now at the pinnacle of your career. You are ready to up-level, because you have the vision and know what things need to be done (your NEW and IMPROVED way).