



# Strategising **YOU**

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# Strategising You

## **Stressed. Traumatized. Grieving. Joyful. Resilient. Enlightened.**

These are some of the words that describe our emotions as we've deal with challenging personal circumstances, and business conditions. This experience may encourage, if not force, you to reflect on what and whom is important in your life.

Isn't it about time you had a strategy for *you*, not just your team or organisation?

### **You might be:**

- Wondering how you can supercharge your performance at work without making too many compromises in your life outside work.
- Looking at your current role and wondering how you can make your days more stimulating.
- Reviewing your career, and wondering if there's something else that fulfils your sense of purpose.
- Planning on transitioning to a new leadership role – or career – and wondering how you can make it a success.
- Wanting to get off to a great start in a new leadership role and then sustain your impact and yourself.
- Feeling close to burnout and wondering what choices you have to turn things around, professionally and personally.

### **How I can help**

This workbook should help you make a start. It sets out the types of questions I use in my work with leaders based on six elements. Every individual and situation is unique so the starting point, and sequence, varies; we'll move to where we need to go, rather than follow a pedestrian, prescriptive process.



1

### Identity – and outcomes

Defining your end game and the way you want to show up.

2

### Challenges – and causes

Working out the source of the problem or the nature of opportunity in granular detail.

3

### Choices – and trade-offs

Finding clarity on the choices in front of you and the trade-offs you have to work through – whether strategic, organisational or personal.

4

### Exploration – and experiments

Creating new hypotheses, ideas and solutions that you can experiment with to see if they work and if they're worth it.

5

### Scaling – and sustaining

Creating the formats to turn experiments into scalable activities and putting in place the resources and incentives to sustain them.

6

### Legacy – and space

Working out what to leave behind to create the space for the new and what to retain as a source of strength.

## What should you expect in terms of the results of our work together?

- An uplift in performance – and reward.
- A greater sense of purpose.
- More resilience.
- Greater momentum towards a role or portfolio you care about.
- More time to do things you truly care about having cut out waste in your life.
- A stronger personal brand – improving your marketability and self-worth.
- An increase in your strategic capability and emotional intelligence.
- A more fulfilling life outside work – whilst maintaining, if not improving, your professional impact.

## Get in touch

I hope this workbook gives you a sense of how I can help leaders achieve these results. If you feel that I can help, and you are looking for a catalyst, strategist or coach then please do reach out to me: [david@davidlancefield.com](mailto:david@davidlancefield.com)

And do take a look at what **other leaders** have said about me.



## Identity

*What is your guiding purpose and 'winning' aspiration? And how do you want to show up?*

### Purpose

- What and whom do you most care about?
- What do you value above everything else?
- What injustice or problem do you most want to overcome?
- What life experience – good or bad – motivates you the most?
- What do you long for most in life?

### Imagine your best possible future (in a time frame relevant to you) and consider these questions

- What would you do if you had no constraints?
- What do you love working on that you would shift your time and attention toward doing even more?
- What would make you feel more alive, vibrant, enthusiastic and excited about your life?
- What would you regret most if you knew you only had six more months to live?
- When you've retired, what do you want your loved ones to say about the impact you've had in your career? What would the best possible future [your name] say about yourself?
- If you had to read a newspaper headline, and story, that best described the 'new you', what would it say?
- Ask your friends and family to share their stories of when you've been at your best; what do you learn from this exercise?
- If you had to craft your best title for your job/role, what would it say?
- What is your 'winning' aspiration?
- Where is there space to try something new or distinctive?

### What does success look like for you (i.e. how will you measure your life?) in terms of the following outcomes:

- Health and wellbeing
- Money
- Happiness
- Relationships
- Career
- Other

### Based on your answers to these questions, describe the outcome you want to work towards and the fullest description of who you want to become

- Describe your identity in terms of the professional and personal aspects – and the skills, experience, style, mindset, focus and non-negotiables.
- Use one or more of the following approaches to help you do this: visualisation, scenarios, time-zero events, letter to self or pecha kucha.



### SEEMA'S STORY

Seema was a highly successful corporate lawyer, making partner at an early age. Life was good, very good in fact. She even found a way to have a life outside work that she enjoyed. But she always had a yearning to do more in the area of human rights – a personal cause, given her background. The occasional stint of volunteering wasn't enough. And so began her exploration of a new professional life.

#### Your notes on identity



## Challenges

*What's the issue you're facing or opportunity you're looking to pursue? What are the causes or dynamics driving it and what can you use to tackle it?*

### **Describe the issue you're grappling with or opportunity you're interested in pursuing**

- What do you know? Believe? Think? Feel? Assume?
- What do you value above everything else?
- What are the 'signals' telling you? What trends are shaping your thinking?
- Who's involved? And what role are they playing?
- What makes it relevant and/or urgent right now?
- How important is it on a scale 0-10? How much energy and motivation do you have to tackle it?
- What's the impact of the issue/opportunity on you and others you care about?
- What would happen if you didn't pursue the opportunity or address the issue?

### **How can you use your resources to tackle it?**

- What have you learnt from previous similar situations – if any – that you have worked through successfully?
- How can you use your colleagues, contacts, family and friends in your 'ecosystem' to help you? Who is likely to be most helpful and how can you best involve them?

### **How far away from your best – or at least, better self – do you feel at present?**

- What state are you in to address it? How would you describe your mindset, energy, commitment?
- How often are you in 'flow' or 'in the zone'?
- How well are you performing against the expectations for your role? How clear are you on your path to the next role you're looking for?
- How close is your work-life balance to what you want? What changes are you considering?





## Take a good look at yourself

*How do you rate yourself on the following?*

<b>Underperforming</b>	<input type="radio"/>	<b>Peak performance</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Bored</b>	<input type="radio"/>	<b>Stimulated</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Stressed</b>	<input type="radio"/>	<b>Challenged</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Empty</b>	<input type="radio"/>	<b>Fulfilled</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Isolated</b>	<input type="radio"/>	<b>Close relationships</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Plateaued</b>	<input type="radio"/>	<b>Progressing</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Work-dominated</b>	<input type="radio"/>	<b>Balanced life</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Stuck</b>	<input type="radio"/>	<b>Learning</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Sick</b>	<input type="radio"/>	<b>Healthy</b>								
	1	2	3	4	5	6	7	8	9	10
<b>Lost sense of self</b>	<input type="radio"/>	<b>Clear sense of self</b>								
	1	2	3	4	5	6	7	8	9	10



## JAMES' STORY

James was being bullied and belittled at work by a boss who was overly demanding and uncaring – even if his image to the outside world was one of being an ‘inspirational’ leader. Ishmael was still delivering strong performance, but it was stifling his ambition and was showing up in his personal life in the form of lower confidence and less interest in socialising. After asking colleagues and friends to share their stories of when he was at his best, he realised that there were plenty of other roles, and jobs, he could do – and within three months he found another role; before leaving, he was courageous enough to share how he felt with his boss.

### Your notes on challenges



## Choices

*What are the choices, and trade-offs, you should consider, professionally and/or personally?*

### **Identify no-regret moves you can make to get you closer to solving the issue or pursuing the opportunity. For example:**

- What changes can you make to where you focus your time and energy to increase your impact?
- What roles can you start doing more or less of? e.g. as catalyst, fixer, negotiator, crisis-handler, advocate in your leadership role?
- What mindset, traits and behaviours do you need to improve upon, e.g. listening, reframing, curiosity, grit?
- How can you reorganise your day and week to create more impact?
- Where would more support help you be more impactful?

### **Develop options for ‘where you want to play’ and ‘how you want to play’ – and also where won’t you play – using a number of hypothetical roles:**

- Newcomer to your role.
- Fiercest competitor.
- Younger self.
- An intern or apprentice.
- A radical you admire.

### **Consider these critical questions:**

- How will you ‘win’? What strengths will you deploy? Which activities do you need to pursue to win? What resources will you need?
- What are the most important trade-offs you have to work through as you consider these options? e.g. within work, between work and home?

### **Make a decision**

- What and whom will help you make a wise decision? e.g. an individual, your own mindset, physical environment, time.
- What would the different thinking hats think?
- What does your intuition tell you?
- How distinctive is your strategy (to you and other relevant people)?
- What will the people you care about most and/or most important to you think of it?
- What would a critic, hell-bent on challenging your chosen option say?
- What needs to be true for this to be a great choice? And which condition is least likely to hold? What worked for you in previous successful decisions?

### **Which options will you pursue?**

- Summarise the decision you’ve taken and explain the rationale (and set out what you’ve decided not to do).



## DENISE'S STORY

Denise decided to accelerate her career, looking for a new leadership role in another organisation that met her professional purpose of helping companies in trouble, safeguarding jobs and livelihoods. She realised that she had been too cautious, limiting herself to the path assumed for her in the current organisation. But she was up for disrupting herself, creating a stronger personal brand – and putting herself forward for new roles. She was clear about her strengths – leading complex programmes, often in turnaround situations with challenging stakeholders. But she needed to create a better deal with herself, and home – more investment in her wellbeing, and more present at home, even if personal hobbies and time with friends have to be sacrificed in the short-term whilst pursuing these new roles.

### Your notes on choices



## Experiments

*How can you best create some experiments or prototypes to test how your choices stack up in reality, helping you to make the right strategic decisions for yourself (and for those you care about)?*

### **Design some experiments to test how well they serve your needs and ambition**

- Which options will you choose to design experiments for?
- Where best and with whom can you try them out? Describe the experiments – what you will do, with whom, measures of success and timeframes.
- How much resource, and time, will you invest in them?
- How much risk are you willing to tolerate in the process?
- What feedback mechanisms will you put in place? How will you pick up the signals effectively?
- How much time will you give these experiments before you make a decision?

### **Learn from the experiments**

- What have you learnt about the role, yourself and others from the experiments? What were you most surprised by?
- How will the experiment help you improve your 'lifetime value'? And get you closer to your aspirational identity?

### **Make a decision**

- How do the option(s) meet your aspirations for your identity and address the issues or opportunities you're facing?
- How do you feel about them?
- How do they score against the criteria you've selected?

## **NOAH'S STORY**

Noah picked three options to explore, creating initiatives over a three month period to test whether they were what he was looking for. He created a side-hustle in an entrepreneurial venture that a friend was starting, rebalanced his working week so he was more available at critical times for his children and put himself forward for a different role at work that played to his strengths in motivating people. After some self-reflection, and consultation with people he respected, he realised that he liked the variety and stimulus of a portfolio life – so decided to find a role that would mean working four days per week, with flexible hours, leaving more time for his entrepreneurial interests and children.



**Your notes on experiments**

A large, empty white rectangular area intended for taking notes on experiments.





## Scaling

*How will you translate experiments into day-to-activities that move you closer to your aspirational identity? How will you build the capabilities you need to succeed and putting in place the resources and incentives to sustain them?*

- What do you need to start/stop/change – and invest in – to get closer to this role/identity?
- What capabilities do you need to improve and/or invest in to support this option?
- What system and processes – your personal management system – need to be put in place to enable this?
- What and whom are the biggest obstacles to overcome (start with the negatives)?
- How can you overcome the obstacles? What will it take?
- What is your plan for: (1) the next week; (2) month; (3) three months; (4) six months.
- What steps will you take? What do you need to put in place to mitigate risks?
- What is your commitment to going ahead? How will you keep yourself accountable?
- What measures (leading and lagging indicators) will you put in place? What do you fear the most in making the change(s)?
- What ‘fuel’ will you use to keep yourself healthy?

### CAROLINE'S STORY

Caroline created a strategy to upskill her leadership capabilities that would help her secure the next role she was pursuing and to create a more structured approach to leading her life. She put support in place to free up her time, and headspace, and create a system to help her decide where to focus, in line with her guiding purpose. Learning to say ‘no’ without any guilt was an important part of this journey.





**Your notes on scaling**

A large white rectangular area intended for handwritten notes on the topic of scaling.





## Legacy

*What will you leave behind to create the space for the 'new you' and what will you retain as a source of strength?*

- What will you take with you from your existing role? What and whom will you leave behind? How will you leave behind relationships, activities or assets well?
- What habits, behaviours or practices do you need to stop doing, both professionally and personally?
- What limiting assumptions (about yourself, others, work, home life) are you making that you need to overcome?
- What have previous experiences of change – positive or negative – taught you?
- How will you remove any negative energy or toxicity from your professional/personal lives?

### STEVE'S STORY

Steve was very disappointed not to get a role he wanted a few years back. Any new opportunity was assessed against this 'dream job' and it never stacked up, and hence he never explored it fully. In fact, he realised that the previous role wasn't so perfect when he heard what it really entailed. And then he changed that failure into a learning experience that helped him pursue new career opportunities.

### Your notes on legacy



## THE STORY *of a* SENIOR LEADER

Isabelle was a high-performing leader, on any professional measure. Admired across a wide stakeholder base, she had delivered exceptional results in all of her leadership roles. She was regularly approached for new roles. Charismatic, analytical, sharp, productive, highly motivated.

But the rest of her life was a ‘mess’ in her words. She didn’t sleep much, had a bad diet, did no exercise and drank too much (but didn’t quite realise she did). Work always came first; she was always ‘on’ and available. It was a long time since she’d had a serious personal relationship, and she knew she didn’t spend as much time as she’d like with her wider family.

Through a series of six coaching sessions we explored what was driving these behaviours and decisions – and then worked through her options for a better life.

The outcome? A new leadership role, better boundaries around work, swimming sessions during the week, a healthier diet, a new relationship and regular time for wider family at weekends. There were still moments when work dominated, and other aspects of her life had to give, but she was more self-aware and committed to bringing her life back in a better balance.

*Note: these are illustrations based on work I've conducted with senior executives; names have been changed to preserve anonymity.*

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