YANCEY
CONSULTING

DREAM PLANNING

Yancey Consulting's Strategy Development Guide for Black Seed Network Members.

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The following includes excerpts from Lisa Yancey's forthcoming manual

Dream Planning.

Moving Beyond Strategic.

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Imagination is your greatest asset. All things become possible when you combine impassioned imaginings with sustained pursuit.

Durable work is built with others. Build in community.

Listen with ears accountable to the future that will inherit what happens.

Make the world you touch better than how you found it. When you work in consideration and community of others, you have the power to manifest any dream you want.

~Lisa Yancey

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Let's first reorient.

No more strategic planning. From this point forward, you are planning for your dreams, visions, and aspirations for the future. And we will declare it as such.

As an expression, strategic planning is a misnomer. When vetting, testing, imagining, and organizing actions, your motivations are much more dynamic and zealous than the word strategic can embody. No one feels strategy with a burning desire. You use it to plot the best pathways toward your yearning. Instead, planning is spurred by whatever wondrous thing you are envisioning.

Strategies are always subservient to the dream—the aspirational vision.

So, let's stop calling it strategic planning. Let's go with

DREAM PLANNING.

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EVERYTHING YOU NEED TO KNOW ABOUT DREAM PLANNING

DREAM PLANNING is a better frame than strategic planning because it accurately positions the purpose of planning as the lead. The purpose of planning is never to be strategic. The purpose of planning is to manifest the dream. Strategy is *in service to* the dream. It is not the anchor.

For example, when I went to France in 2014 to think about how I wanted to enter my forties and what I wanted to plan to manifest, what emerged was a twenty-year Wealth Building Plan. Determining the methods to build wealth was the plan for the first ten years. The subsequent ten will focus on the amplification and scale of that plan. It takes at least a generation to fully experience the manifestation of a durable vision. There will be wins along the way, but the arc of time for dreams to manifest is protracted.

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DREAM PLANNING REMINDERS

Keep this list accessible throughout your planning process.

(Attribution: Lisa Yancey and Yancey Consulting unless otherwise noted.)

1	Your dream—also called your vision— is the beginning and the end. Everything starts with your dream and yearnings.
2	Strategy is in the service of vision.
3	Imagination is your greatest asset. It is the magic that makes the unbelievable, unimaginable, and impossible possible.
4	The antagonist of impossibility is persistence.
5	Missions are declarations. They are emphatic, meaningful, and transformative when they impact the lives of more than one person.
6	Your values define where you stand and where you *should* engender personal accountability. Where you prioritize and allocate resources is what you value most.
7	Audre Lorde declared, "There's no such thing as a single-issue struggle because we don't live single-issue lives." Strategic contemplations must integrate intersectional and ecosystem-based purviews.

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DREAM PLANNING REMINDERS

8. Don›t confuse symptoms for root causes. Always source the root issues when problem-solving.

9. Relationship building is stronger than periodic engagement.

10. Your purview should always be beyond your tenure. How are you contributing to a better future?

11. Due diligence and grounding logics are imperative when solving complex problems.

12. After you have named your goals, but before you contemplate the strategies to achieve them, ask yourself if they are worthy enough. Bob Proctor is credited with saying, “Your goal should be something you believe in so much that it is worthy of your pursuit of it.”

13. Embrace resourcing holistically—socially, communally, financially, ethically, systemically, humanly, digitally, legally, and with policy.

14. The lack of money alone will *never* impede a vision. It may stall it. It may force a rethink. But it will never impede when the vision is worthy of pursuit.

15. You can’t read enough.

16. You can’t listen enough.

17. You can’t reflect enough.

18. You can’t be humble enough.

19. You must be clear and true and accountable and honest to the best of your ability at the moment you are in.

20. Power is relational and never static or one-sided.

21. You can padlock a building (or burn it, in this case), but you can never padlock an idea. This is a philosophy, belief, and practice of The Highlander Folk School in Tennessee, founded in 1932 by Myles Horton.

22. A tactic is strategic when it has the possibility to get you to your goals in a way that aligns with your values without fully depleting your resources.

23. Being fully exhausted or breeding or contributing to a culture of exhaustion is the opposite of thriving and is diminishing, extractive, and never good.

DREAM PLANNING REMINDERS

24	Communal agreements must be a common practice.
25	Clarity of the roles and agency participants in any group session have regarding decision-making must be named, discussed, and understood from the beginning.
26	Power dynamics are real and must be named and discussed to uplift the implications so that protocols can be put in place in areas that would impede the desired degree of honesty and engagement.
27	You will need to know how to work through conflict within yourself and with others.
28	Plans are only as good as their implementations.
29	Don't let short-term moments shadow long-term visions. Even when focused on the short term, never take your eyes off the north star, which will emerge over time.
30	All of this is a journey. Be iterative and adaptive.
31	Your vision is the beginning and the end. It is the dream becoming.

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ANATOMY OF A DREAM PLAN

Elements that provide the container for your plan's ambitions, purpose, and guideposts

The Dream or Vision: a vivid and compelling imagining of your desires. It is an enthralling and articulable description of something not yet in existence but what you yearn to make real. Scalable and transformative visions capture the needs or longings of many people within a bound community of broad populations.

Mission: an emphatic declaration of what you are committed to doing. It expresses your purpose and aspiration. Missions set the stage for inspired action.

Values: the nonnegotiable principles that guide your actions. They reflect how you want to be and be seen in the world. They are your moral guideposts and internal accountability filters.

Elements that provide clarity and focus

The Issues: the problems or opportunities you seek to solve or seize. The specific things the plan is focused on.

Priorities: express the things or conditions identified within the issue or opportunity areas that command more immediate attention. These are the things deemed most critical at the moment because resolving them will likely have a profound effect on the success of the pursuit.

Goals: clear, inspiring, and measurable articulations of what you aim to accomplish within your priority areas during a fixed term.

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PAUSE POINT

Once your goals are clear and expressible, check to make sure they can move you toward your dream, align with your mission, and are executable within the bounds of your values.

Elements that provide grounding for strategy development

Context setting: sets the frame for your vision. Here is where you answer questions such as What's your story? Why do you exist? What have you accomplished? What inspires the desire or need to dream? What makes this a moment to reimagine? Document what makes this moment the moment.

Ecosystem mapping: Identify the people, entities, systems, policies, laws, and environment that make up the ecology of your mission, vision, and goals. Name and map how this ecology functions as an interconnected and interdependent system. What are their interlocking relationships? And what are the beliefs that hold them together?

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Elements of strategy development

Strategy development: a values-aligned process that stages actions to pursue a clearly defined goal.

Actions are strategic when they are

- governed by the values that drive who you are or who you want to be,
- informed by comprehensive and credible data that reveal where you are and the interdependent systems and beliefs that keep that positionality in place,
- developed by analyzing the strength and fragility of the interdependent system that is or will be a determinant of your dream's success,
- designed with a regenerative or restorative consciousness that understands the replenishing capacity of the resources required to implement the strategy, and
- implemented with a discipline that does not leave you exhausted of your resources or in a diminished capacity when you achieve the goal.

Strategies consider complex variables and conditions, such as

- where you are now in relation to where you want to go,
- the depth, expanse, and value of the relationships you hold regarding where you want to go,
- your history,
- your credibility,
- the state of your finances (what's available for investment),
- your staff (size, composition, enthusiasm, interest, culture),
- the level and expanse of skills and experience you can engage,
- your spheres of influence (and the degree to which such influence matters in achieving the goal),

- your environment (social, political, geographical),
- where you locate within power hierarchies that impact decision-making,
- where you need buy-in, investments, vested interest, and
- the extent to which what you are seeking to do translates reciprocal value to those with whom you need to engage and those directly impacted by this pursuit.

You want a trusted, diverse, and experienced group of people representative of the ecosystem that you need to engage involved in your strategy development and vetting process. Once you have identified strategies that meet the above criteria, confirm that they align with your vision, mission, and values.

Strategy vetting: Once the open ideation part of your strategy development is complete, you must create space to pulse-check the ideas you and your team developed. In this phase, interrogate and debate the following questions:

- Are these strategies values aligned?
- Are they viable tactics to accomplish the goals?
- Is it feasible that these strategies will generate and sustain the resources needed to achieve the vision without depleting the regenerative health and wellness of the people, community, and environment that are being accessed to realize these goals?
- What could amplify the outputs of these strategies?
- What could diminish the outputs of these strategies?
- What could impair any meaningful output altogether?
- Are the assumptions driving and supporting the strategies well-documented?
- What could make any of your assumptions untrue? Name what would make the assumptions untrue, and discuss how to prepare for that situation and outcome.

2. This is a big question. Implementation ideas are only strategic if they do not deplete the resources necessary to implement them. Your ideas cannot simply take without restoring or finding balance.

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Strategy refinement: Here is where you make adjustments to your strategies. Considering your vetting diligence, what should be incorporated, enhanced, reduced, or eliminated regarding your strategies? Adjust accordingly. Once you have adjusted, do another active confirmation of your mission, vision, and values alignment.

Milestone mapping: Discuss and name what shifts should happen if your strategies work. What will begin to change in the mood, culture, policies, representation, leadership, investments, prioritization, programming, vendors, and anything else directly connected to the change you want? What key things should you name and track as results during the planning period?

Identifying resources: What resources are needed to implement the strategies that will get you to the milestones? Discuss how to access them.

Sources and uses: If you do not have the resources, where/how will you acquire them? In this planning segment, you identify who could contribute and what they need to say yes. What stories need to be gathered and shared to garner support? Name all who could and would listen. Make a table, and connect these dots. For those you identify, affirm their alignment with your mission, vision, and values.

Reflection and celebration practice: Determine when you celebrate, reflect, and pause. Name how you will integrate a culture and practice of reflection. Reflect on learnings. Reflect on progress. Reflect on and eliminate patterns that diminish progress toward your goals. Name the reflection actions you will take (meetings, surveys, community gatherings, etc.) and the frequency of those actions. You also have to celebrate the wins.

No matter how grand or small, one has to feel incremental wins to reinforce the commitment to and desire for the goals. Plan for space to acknowledge, retreat, and celebrate the commitment to and progress on the goals.

Holding time: I want you to know that time bends. It's not linear. Sometimes it feels fast because it is fast. Sometimes it feels slow because it is slow. People move on different rhythms. And even those rhythms move on different rhythms at different times. So, when you are mapping, think spatially. Think contextually. Consider everything you need to do, but pay attention to how people move in summer rather than winter, for example. I also want you to think generationally. In each of our lives, we interact with people across different generations. Holding that a generation is twenty to twenty-five years, consider how many sets of twenty-year age differences exist in your life and will exist in your vision.

Map your plan: Now, you document how you plan to implement these strategies across the period of focus. Sustained action is the making of a dream. It is the manifestation of imagination. Name all stated actions and the time associated with those actions. Include milestone markers and reflections. Documentation can be done via a critical path schedule or as bullets under the goals.

30/60/90: Now that you have a plan, how do you move from planning to doing? Focus on the next 30 days, 60 days, and 90 days. What must you do in the first three months to prepare to implement your plan? Where will you post your declarations to keep them front and center? Where do you post them publicly, or how will you let the external community know your vision and goals? You may need more than three months, so adjust your preparation time accordingly. It may be six months. It may be nine months. Extend your preparatory phase work accordingly.

Map. Name all the holidays and known special events you need to consider in planning. Pull their dates, and plot them in the quarters for reference and reminders of availability. List everything you are already committed to during this time frame. This is critically important. Often folks list only the new things without naming what's already committed. And of those things, list what you will no longer do to make space for the new things. Another important thing that gets overlooked. Assign who is responsible for what. Make sure implementation responsibility is disbursed and decentralized throughout the organization. Place these actions on calendars, and integrate them into work planning updates and assessments.

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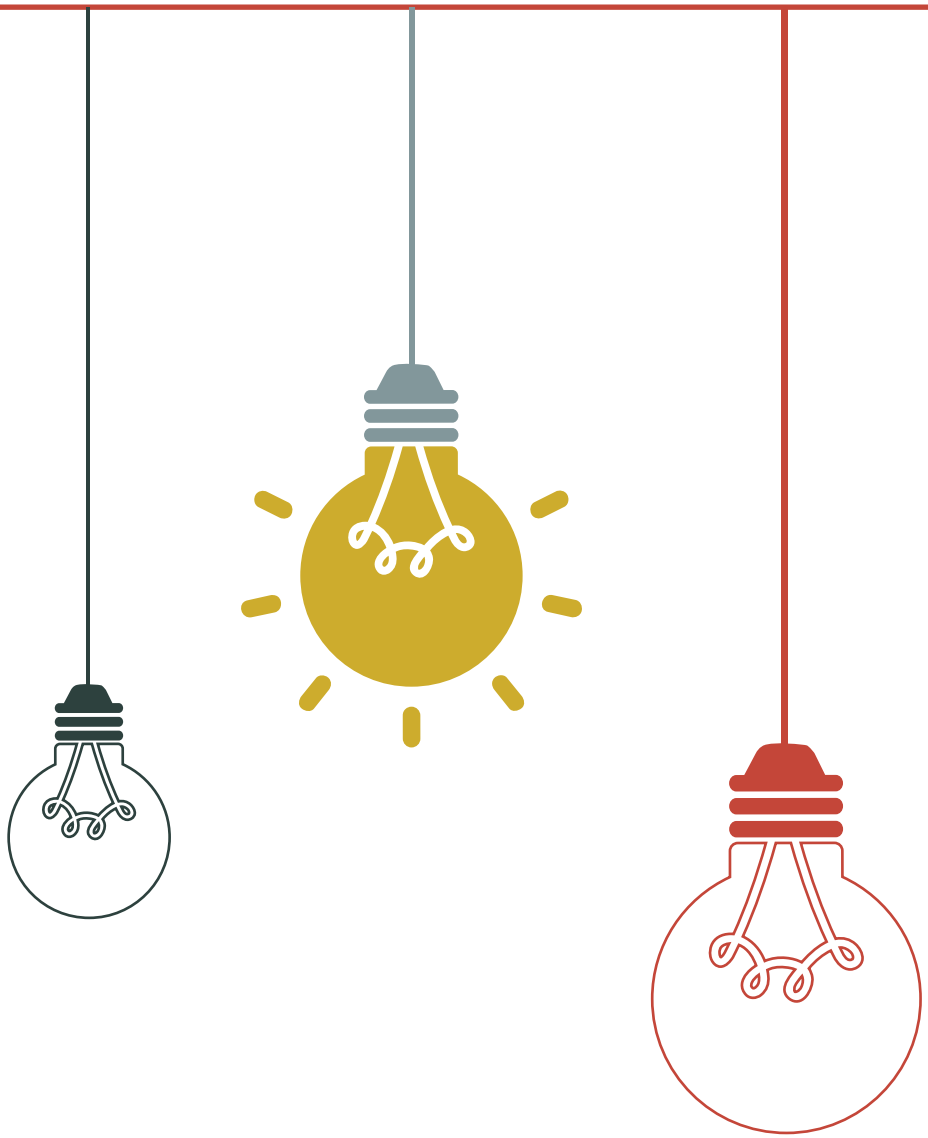
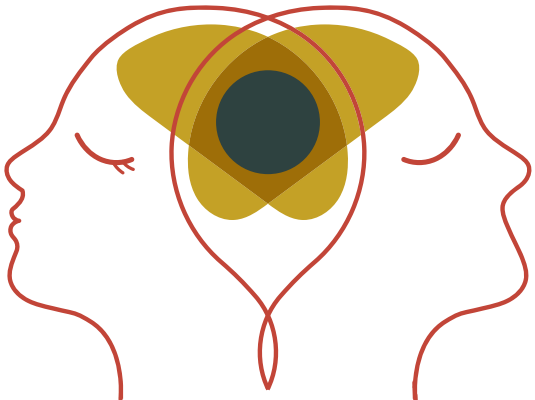
Copyedit, design, and format versions: Don't let grammar mistakes and typos compromise conveying the brilliance of the ideas that emerged from your Beyond Strategic™ planning process. Send the plan to a copy editor. Then, make it visually appealing. Determine the various versions you need. Common versions are the full plan with a budget, the full plan without the budget, an executive summary, and a two-pager.





Concluding Thoughts

You have everything you need to guide you through a planning process. What are not listed are the people, spaciousness, prioritization, patience, grace, and courage necessary to stay in the process, positioning the outcomes and the relationships knitted during the process, durable and potentially transformational.

Name who needs to be engaged for each action item in the clusters and to what degree (time).

- Who helps you think?
- Who helps you implement?
- What is entirely on you?
- Name them parenthetically next to the action items.

Identify whom you need to work with you in this planning and implementation. See who is impacted and implicated by the goal and represented in your organized clusters.

- Determine the ask of them.
- Identify the expectations of them and yourself.
- Agree on the time they should make available for this work/partnership.
- Decide what you will offer in consideration of their time/expertise.

Lastly, determine your plan for how you will account for patterns that keep you in place—that keep you from advancing toward your goal. Follow each step above with a group of people who believe in the vision. Make sure you work in community. You want people impacted by the decisions made to inform the strategies. These include the people expected to implement the work and those identified as the persons for whom the work is for. They, too, must have a voice that lends credibility to the thinking and strategies identified.

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