



Welcome

High Alpha Summit & Neville Advisor's College



Dan Hartmann

**President and CEO of the Educational
Foundation**





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Troy Medley

Chief Executive Officer





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Chief Executive Officer

Strategic Planning

LIFE NEEDS A VISION, VISION NEEDS A PLAN!



LEARNING OUTCOMES

After the session, you will be able to:



Begin to create the initial strategic plan for your life



Accurately explain the components of a strategic plan to your Brothers



Create a strategic plan for your chapter

INVESTMENT ACTIVITY

- You have up to \$10,000,000 to invest in the following entity.
How much will you invest?

Vision



WHAT IS A VISION?

- **A simple statement that describes what you want!**
- **Your “want”**
- **Textbook Definition:**
 - A vision statement is an inspirational statement of an idealistic emotional future.

AVON

- To be the company that best understands and satisfies the product, service, and self-fulfillment needs of women—globally.



AVON
CALLING
for 75 years!

EXPECT YOUR AVON REPRESENTATIVE to call at your home soon with cosmetic news in honor of our 75th Anniversary. Yes, behind your Avon Representative are 75 years of friendly, *personal* assistance... 75 years of understanding your needs and anticipating them with beauty-laden cosmetics, fashionable makeup, fragrances you love. Thanks to your Avon Representative, and thanks to Avon's steadfast standards of quality, more women use Avon than any other cosmetics in the world.

AVONcosmetics
RADIO CITY, NEW YORK
75 years of beauty service to the home

LAMBDA CHI ALP

- Lambda Chi Alpha envisions a world where the ideal man:
 - Pursues a life of respect and inclusion for all
 - Supports one another to make a positive impact on society
 - Models' loyalty, duty, service and stewardship, honor, integrity and personal courage



MY VISION STATEMENT

Vision

Troy Medley was laid to rest at 100 wearing a t-shirt reading, “Pull My Finger”. When God met him at the gates of Heaven, he laughed at the shirt and said, “Good Job! Although it got rocky on a couple of occasions, you made the most of all I invested in you.” As a gift, God offered Troy the opportunity to listen to the impact of his life, as told by others at his eulogy. The scene they watched together is summarized below:

In the packed sanctuary of the Country Club Christian Church in Kansas City, Troy’s family, friends, and the countless numbers of people he helped celebrated Troy’s life.

Jaime, his wife of 76 years and best friend since High School, spoke first and told the crowd of Troy’s sense of humor, immense love of family, and that he always made her feel special and loved.

Next, his daughters told stories about the times they went on Daddy Dates as children and of the lessons they learned from their dad about how to live successful, happy lives based on the foundation of God, family, entrepreneurial work, and service.

Troy’s minister and associates from various non-profits for which he worked as a volunteer spoke next and talked of the generations of youth Troy helped in charter schools, at church, and through Miracles for Kids. Some of the lessons of Troy’s life are that where one starts does not determine where one must finish, that the more one gives away the more he or she receives in return, that even a broken path can be used by God to create abundance for others, and that it is good to be good looking.

Finally, dozens of people that Troy helped realize their dream of business ownership and self-sufficiency while a charter school founder, investor, business leader, and professor shared how he assisted them make their dreams come true by providing wisdom, capital, and knowledge.

Then, everyone went out to celebrate on Troy’s dime.



Purpose

WHAT IS PURPOSE?

- **Purpose is the defining reason for your life!**
- **Your “Why”!**
- **Test book definition is:**
 - A purpose statement describes the overarching reason that a company exists, how it should conduct itself and the impact it has on who it's serving.

SOUTHWEST AIRLINES

- To connect People to what's important in their lives through friendly, reliable, and low-cost air travel.



LAMBDA CHI ALPHA

- Inspire and equip men to lead an ethical life of growth, service and leadership.



MY PURPOSE STATEMENT

- To build organizations that help others become physically, emotionally, financially, or spiritually healthy.



Values



WHAT ARE VALUES?

- **A simple list of the beliefs that drive your actions.**
- **Your “Compass.”**
- **Textbook definition:**
 - Core values are the organization’s long-term beliefs and principles that guide employee behavior.

VANS

- We are determined
- We are connected to our consumers and to each other
- We are inclusive
- We are expressive and fun
- Most of all, we are a family



LAMBDA CHI ALPHA

- Loyalty
- Duty
- Respect
- Service & Stewardship
- Honor
- Integrity
- Personal Courage

MY VALUES STATEMENT

- **Health**
 - The body and mind are gifts from God, and it is my responsibility to keep them in good working order.
- **Wealth**
 - Long-term value is superior to short-term luxuries and should be pursued with exuberance.
- **Work**
 - To earn reward via effort makes the prize more meaningful and sustained.
- **Gratitude**
 - Everything received in life, both the pleasurable and painful, is a gift and should be celebrated accordingly.

SWOT



WHAT IS SWOT?

- **Defines where what you like to do and what you do well come together.**
- **Your “superpowers and kryptonite.”**
- **Textbook Definition:**
 - A study undertaken by an organization to identify its internal strengths and weaknesses, as well as its external opportunities and threats.

MY SWOT

Strengths	Weaknesses
<p>Highly intelligent</p> <p>ENTJ – Life’s natural leader</p> <p>Successful start-up, turnaround executive</p> <p>MBA</p> <p>Articulate public speaker</p> <p>Skilled teacher</p> <p>High energy, ability to perform massive quantities of work</p> <p>When authentic, confident and engaging personality</p> <p>Strong management skills</p> <p>Learns quickly</p> <p>Able to assemble highly effective teams</p> <p>High internal locus of control</p> <p>Ambitious</p> <p>Introspective</p> <p>Believes he is the chosen one and acts accordingly</p>	<p>Vain, egotistical, and often condescendingly arrogant</p> <p>Impulsive, prone to action</p> <p>Sees self as on perpetual probation</p> <p>Impatient, easily bored, stubborn</p> <p>Prone to emotional outbursts when frustrated</p> <p>Seeks to please father figures</p> <p>So focused on own needs and ambitions that often takes loved ones for granted</p> <p>Not consistent at cultivating relationships</p> <p>Prefers planning life to actually living</p> <p>Needs control to feel safe</p> <p>Believes he is the chosen one and acts accordingly</p>
Opportunities	Threats
<p>Create holding company of fitness franchise brands</p> <p>Consult with growth companies or hospitals</p> <p>Second term as Elder at LPC</p> <p>Determine how to monetize public speaking ability</p> <p>Become adjunct professor</p>	<p>Boredom</p> <p>Become over dependent on things as definer of success</p> <p>Again, take on too much risk in pursuit of wealth</p> <p>Geographically spread self too thin</p>



Strategy

WHAT IS STRATEGY?

- **A strategic plan aims to explain how to achieve a long-term vision. It defines who you serve, how you differentiate yourself from competitors, and how you generate value.**
- **Your “How”**
- **Three Strategic Approaches:**
 - **Cost Leadership:** Offering the lowest priced products in a specific market.
 - **Differentiation:** Creating uniquely desirable products and services.
 - **Focus:** Offering a specialized service in a niche market.

MY STRATEGY

- **Differentiate by utilizing an advanced corporate skillset to build undervalued entities in unsophisticated markets.**
 - I utilize a combination of differentiation and focus to allow me to charge higher prices than competitors and/or reap higher profits

Goals



WHAT ARE GOALS?

- **Goals provide direction, motivation and incremental progress reports in pursuit of vision.**
- **Your “fuel.”**
- Start by setting lifetime goals. Then, work down to the things that you can do in the next five or ten years, then one year, then one month, then one week, then today.

GOAL CATEGORIES

- **Career**
 - What level do you want to reach in your career, or what do you want to achieve?
- **Financial**
 - How much do you want to earn, by what stage?
- **Education**
 - What information and skills will you need to have in order to achieve other goals?
- **Family**
 - Do you want to be a parent? If so, how are you going to be a good parent? How do you want to be seen by a partner or by members of your extended family?
- **Attitude**
 - Is any part of your mindset holding you back? Is there any part of the way that you behave that upsets you? (If so, set a goal to improve your behavior or find a solution to the problem.)
- **Physical**
 - Are there any athletic goals that you want to achieve, or do you want good health deep into old age? What steps are you going to take to achieve this?
- **Pleasure**
 - How do you want to enjoy yourself?
- **Public Service**
 - Do you want to make the world a better place? If so, how?

MY GOALS

The following goals will be achieved by Troy Medley by 2028.

- **Family**
 - Still be married!
 - Have happy, healthy, and hopefully fully employed daughters
 - Improve relationships with father and brother
- **Professional:**
 - Build a highly profitable company that creates health, wealth, and personal well-being for me and at least 5,000 happy customers, is worth \$10,000,000 at time of harvest, and allows me the luxury of time.
 - Contribute to growth of PrimaHealth Credit and share responsibility for \$1B exit
 - Work as adjunct professor of Entrepreneurship or Strategy
- **Spiritual**
 - Figure out how to finally stop trying to be in charge and let God take over
- **Physical**
 - No disease
 - Be a bad-ass MoFo as measured by body-fat, life-age, aerobic capacity, and muscle mass
 - Still have what's left of my hair
- **Financial**
 - Be debt free
 - Have a liquid net worth of **\$5,000,000**
 - Have a house on Ward Parkway in Kansas City

Tactics



WHAT ARE TACTICS?

- **Tactics determine the specific actions to take to achieve your short-term or long-term goals.**
- **Your “chosen actions”**
- **Textbook definition:**
 - Tactics are short-term plans and actions that influence the success or failure of a chosen strategy. Because they define an action, they're often time-limited and can be quite fluid.

MY TACTICS (CHOSEN ACTIONS)

Marketing

- **Remain in Gen-Next and meet members located throughout the country**
- Publish an article on Entrepreneurial Leadership
- Be guest lecturer at multiple universities on the topic of Entrepreneurial Leadership

Operating

- Turn down all opportunities that don't allow me to spend time with family and control time
- Obtain PhD or EdD in Organizational Leadership
- **Partner with Executive Coach or join WPO/similar organization to ensure trusted relationships in place to call me on my dumb ideas and stubborn streak**
- Join for-profit boards in franchise and/or health and wellness industries

Financial

- Stop buying shiny things I don't need!
- Expand wealth by building a portfolio of cash flowing franchise businesses
- **Invest 25% of income in long-term equities**
- Teach the girls how to save, invest, and tithe

Philanthropic

- Join church governing board
- Serve as Chairman Emeritus to Miracles for Kids
- Grow Epic Charter Schools of Orange County to become largest charter in the state
- **Donate 10% of income**

HOW TO STAY ON COURSE?

- Live your life like a world-class CEO runs a company
- Know who and what you are, tenaciously stick to being who and what you are, continuously stretch to become a better version of who and what you are!
- Annually review, renew and recommit; don't be afraid to change your goals when opportunity knocks!
- Remember, know one else knows what in the heck they are doing either!

HOW TO APPLY YOUR CHAPTER?

- What is your vision?
- What is your purpose?
- What is your values?
- What are your superpowers and kryptonite?
- What is your strategy?
- What are your goals?
- What are your tactics (chosen actions)?
- How will you stay on course?

“KEEP WORKING ON A PLAN. MAKE NO LITTLE PLANS. MAKE THE BIGGEST ONE YOU CAN THINK OF AND SPEND THE REST OF YOUR LIFE CARRYING IT OUT”.

- HARRY S. TRUMAN



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