

# Realistic Planning as the CEO: The Unrealistic, The Real, and The Unexpected

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## Introduction

Running a company involves balancing the creation of realistic plans with the inevitable curveballs that come your way. Whether you're focusing on growth or managing day-to-day operations, the plans you create today can quickly become outdated as your business evolves. The challenge lies in crafting strategies that are actionable and adaptable while staying grounded in your current reality.



## The Fine Line Between Ambition and Unattainable Plans

Thinking big is natural when you're responsible for your company. However, there is a fine line between setting ambitious goals and creating unattainable plans. A common mistake many leaders make is overreaching, which can lead to wasted resources, burnout, and missed opportunities.

Unattainable plans can stem from various factors—ambition, comparison, and external pressures. It's easy to fall into the trap of trying to accomplish too much too soon, often because we see others seemingly achieving great things with ease. However, the true strength of a company lies in developing plans that fit within the current reality while still pushing for growth. And most importantly, these strategies must leave room for the unexpected, because every leader faces moments of "never saw that coming." Crafting realistic, flexible strategies is key to sustainable success.

This brief breaks down the key aspects of planning and execution into three parts: **The Unrealistic, The Real, and The Unexpected**. We'll explore how to align your strategies with what is achievable, avoid overreaching, and prepare for the inevitable surprises that every company encounters.

## The Unrealistic: Why Do We Set Unattainable Plans?

The drive for rapid growth, underestimating resources, and external pressures can lead to setting plans that aren't achievable. Many leaders become fixated on future success,

overlooking the current limitations of their operations. The result is an overambitious plan that fails to consider the company's existing capacity. These missteps can occur when:

- **Chasing Quick Wins:** Trying to leapfrog critical stages of development.
- **Misjudging Available Resources:** Overestimating what can be done with limited time, manpower, or capital.
- **Ignoring Operational Realities:** Overlooking the daily challenges that slow down progress.
- **Succumbing to External Pressures:** Feeling the need to keep up with competitors or satisfy external expectations.

Unattainable plans ultimately lead to frustration and, worse, stunted growth. Grounding your strategy in achievable steps can help build momentum toward long-term success.

## The Real: Grounding Your Plans by Making the Intangible Tangible

What you create today may not look the same tomorrow, and that's something you must be comfortable with. Successful planning is about consistently thinking, reading, writing, and evaluating. These intangible actions become the foundation for your tangible outcomes.

To get comfortable with change—and the unexpected surprises that come with it—you need to understand the two phases you will pass through:

### 1. The Intangible Phase

In this phase, much of your work won't bring immediate monetary returns. You'll be setting goals, creating visions, organizing your operations, and strategizing for tomorrow. These tasks lay the groundwork for the company you want to build, but they don't always produce instant results. This phase is about shaping the internal mechanisms that drive your decisions and future outcomes.

### 2. The Tangible Phase

Once your foundational work is in place, you'll start to see tangible outcomes: acquiring your business identity, improving profitability, securing physical resources like vendors or equipment, and documenting your internal processes. This is the phase where strategy translates into visible, touchable results.

To navigate both phases successfully, it's crucial to prepare by breaking barriers, crafting your development strategy, and committing to ongoing education.

## Steps for Grounding Your Plans: Practical and Actionable

### 1. **Start with Your Current Reality**

Begin by acknowledging your company's present state. What resources do you have available? How effective are your existing processes? Don't focus too much on where you want to be next year or even five years from now; ground your strategy in the resources you have at your disposal today.

Ask yourself:

- Are your systems working at full capacity?
- Can you grow sustainably from where you stand, or do you need to stabilize first?

### 2. **Prioritize Actionable Wins**

Instead of aiming for big, sweeping changes, focus on smaller, measurable victories that move the needle over time. Incremental successes compound and build momentum. Set goals that allow you to measure progress in clear and actionable ways, rather than waiting for a big breakthrough. These smaller wins can compound into substantial gains, ensuring that you're always moving forward—even if the steps are smaller than originally envisioned. Each small win takes you closer to your goals without overwhelming your operations or your team.

### 3. **Recognize the 'Good Enough'**

Perfectionism can be a barrier to execution. A strategy doesn't need to be flawless; it needs to be functional. Understand that sometimes 'good enough' is exactly what your business needs to progress. Make peace with the fact that not every plan needs to be flawless; in fact, the imperfections in your strategies will often lead to valuable learning opportunities.

### 4. **Build in Flexibility**

One of the greatest barriers to realistic planning is rigidity. Rigidity in planning often leads to frustration when things don't go as expected. The best plans are adaptable, allowing you to pivot, when necessary, without losing momentum. Being overly committed to a specific outcome can cause your business to suffer when things don't go as planned. Leave space in your strategies for adjustments and anticipate that not everything will go according to plan.

### 5. **Regularly Review and Adjust**

Planning is an ongoing process. What works today may not work tomorrow, and that's okay. By building checkpoints into your plan, you'll know when you're veering off track, allowing for quick adjustments without derailing your entire strategy.

## The Unexpected: Embracing "Never Saw That Coming"

Every company, no matter how well prepared, faces unexpected challenges. Whether it's a shift in the market, a sudden change in demand, or an internal disruption, surprises are inevitable. The key is not only being prepared for these surprises but learning to be okay with them.

When something unexpected happens, it's easy to feel blindsided, but there's value in viewing these events as part of the natural rhythm of business. The more you learn to anticipate the unexpected, the more resilient your business will become. To handle the 'never saw that coming' moments, focus on these principles:

### 1. **Anticipate, but Don't Fixate**

You can't predict every twist and turn, but you can plan with flexibility in mind. Expect that changes will happen, but don't get bogged down in obsessing over what might go wrong. Focus on building a strategy that can adapt, not one that's so rigid it breaks when the unexpected occurs.

### 2. **Separate Emotion from Reaction**

When surprises hit, it's easy to let emotion cloud your judgment. One of the most important skills as a business owner is learning how to process setbacks without letting them derail your judgment. Take a step back, evaluate the situation, and respond with a clear, level-headed approach. Emotional agility in these moments can save you from making reactionary decisions that hurt your business in the long run.

### 3. **Turn Unexpected Events into Learning Opportunities**

Each 'never saw that coming' moment is a chance to learn and improve. If things don't go as planned, look for what you can take away from the experience. Was there a gap in your planning? Did your team struggle to adapt? Did your strategy lack flexibility? These moments will strengthen your business for the future if you choose to approach them with curiosity rather than frustration.

## *Moving Forward: Aligning the Intangible and Tangible*

To ensure that your strategy remains balanced, here are three key areas to focus on:

### **A. Transferable Skill Development**

As the leader, your focus should be on continually refining and expanding your skill set. This allows you to adapt to changes and maintain leadership through unexpected challenges.

### **B. System-Centric Business Focus**

Your systems—not just your people—should be designed to drive cash flow and operations. By focusing on system-centric improvements, your company can remain stable even when surprises hit.

### C. Documentation as Tangible Evidence

Consistent documentation of your strategies, processes, and plans is critical. Documentation provides a tangible reference that keeps everyone aligned and makes course corrections easier.

## Finding the Balance Between Ambition and Realism

Balancing your drive for growth with the practical realities of running a company is key to sustainable success. Here are four unique strategies to prevent ambition from overtaking your business's realities:

- **Use Data to Inform Ambition:** Ambition runs on vision, but it must be backed by real data. Regularly review your financials, operations metrics, and market trends to ensure your goals are informed by facts, not just desire. Data-driven planning helps keep your ambitions grounded in what's possible while pushing the boundaries of what's achievable.
- **Prioritize Sustainability Over Speed:** Rapid growth sounds exciting, but it can lead to instability if your CORE isn't solid. Prioritize building sustainable systems and processes that will support your long-term ambitions rather than chasing quick wins. This ensures that your business is equipped to handle growth when it happens, without crumbling under pressure.
- **Set Hard Limits on Resources:** Ambition often leads to pushing resources beyond their limits. To prevent this, set firm boundaries on what you can allocate—whether that's budget, time, or personnel. Make sure each plan includes realistic caps for what can be spent or dedicated to a project. Knowing your limits upfront prevents overextension.
- **Regularly Reevaluate Your Goals:** Business environments shift quickly, and what was once a realistic goal can become unattainable in a different context. Schedule regular evaluations of your strategies to ensure they still align with current circumstances. This practice allows you to adjust ambitions before they veer into unrealistic territory.

### *The Solo CEO: Planning Beyond One Person*

For many CEOs, especially those who are running their company solo, it's easy to fall into the habit of creating plans that only account for what one person can manage. When you're wearing multiple hats—handling operations, sales, and administration—it can feel natural to build strategies that focus on your current capacity. However, this approach often limits your potential for growth.

One of the most important shifts you can make in your planning process is to consider how your business will expand beyond yourself. This means creating strategies that involve building a team, whether through contractors, employees, or key vendors, to help support the execution of your plan. Even if you're not able to hire immediately, your planning should reflect how you will structure and delegate responsibilities as your company scales. Think about:

- **Delegating Tasks:** Identify areas where additional help is most needed and consider how you can onboard others to take over those roles.
- **Delegating Systems:** Develop clear processes that will allow others to step in and execute parts of your plan without constant oversight.
- **Building Relationships:** Nurture connections with potential contractors, vendors, or future employees, so when the time comes, you can bring them in seamlessly to support your business.

By thinking beyond what you can do alone, you're not just planning for today—you're positioning your company to grow sustainably with the right support in place.

## Conclusion: Planning Supports Your Executive Role

The key to stopping unattainable planning is finding the balance between ambition and realism. By grounding your strategies in the present, setting incremental goals, and remaining flexible, you can create actionable plans that reflect the unique stage of your business and your role as CEO.

In any business, surprises are inevitable, but with grounded, flexible planning, you can remain prepared for whatever comes your way. Make the intangible tangible—by focusing on consistent education, reflection, and adaptation, you'll be equipped to handle both the known and the unknown. Your success won't come from creating perfect plans but from executing real, actionable strategies that leave room for growth, change, and the occasional curveball.



Sherese Duncan, CEO of Effició, Inc., with over 20 years of experience in helping company owners get to the CORE of their business and live the entrepreneurial life with style.

## Executive Invitation

If you're looking to refine your approach to creating realistic and adaptable business strategies, we invite you to join us for an **Executive Briefing**. In this session, we'll explore how to build plans that balance ambition with practicality and discuss how to prepare for the unexpected moments every business encounters. You'll leave with actionable insights that can help your company grow sustainably.

### [Executive Briefing Details and Request](#)

For those who are ready to take their planning to the next level, our **Advisory Services** are designed for business owners who want to develop comprehensive, long-term strategies. Our experts will work with you to craft a tailored approach that aligns with your company's current needs while preparing for future growth.

### [Advisory Details and Request](#)

If you're interested in connecting with other experienced entrepreneurs to explore advanced business concepts, consider joining our **Research Network**. You'll gain access to exclusive reports, research reviews, and a private community where you can engage in strategic discussions and share insights with peers.

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Eager to explore how we can collaborate,



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