



Executive Advisor, to Business Large & Small

Kat Nesbit

SMART

Comprehensive Goal Setting

TEAMS: Structured learning in an open forum
for real time results.

Exploring your businesses' basis for strategy, execution and success!

The SMART areas of our exploration:

- How well do you define your goals? Milestones? Are you clear & **Specific**?
- What tools do you use to **Measure** success? How well do you use/share them? Is your data clear enough to be measured?
- Do you know how to hold your team and yourself to what you said you'd do? Do you have systems for holding people **Accountable**?
- Are you convinced the activities you have chosen affect your goals are **Relevant** activities for success?
- What tools are you using to support you and your team keeping your eyes on the ball? What are you doing to keep your goals **Top of Mind**?

For your consideration:

"No matter how brilliant your mind or strategy, if you're playing a solo game, you'll always lose out to a team."

~ Reid Hoffman

For your consideration:

"It's hard to do a really good job on anything you don't think about in the shower."

~ Paul Graham

A comprehensive view of the most important thing you do.

SMART Goals, A Peter Drucker concept

What keeps your direction and vision clear for you and your team?

The SCOREBOARD



People play differently when they're keeping score. Have you ever watched a street game of some kind; basketball, hockey, football, when the players were not keeping score? Players tend to do whatever they want, the game stops for a few jokes, and the playing is not very focused. But when they start keeping score, things change. There's a new intensity. Huddles happen. Plays are improvised. Players adapt quickly to each new challenge. And the speed and tempo build dramatically.

The same thing happens in a work team. Without crystal-clear measures of success, members of a work team are never sure what the goal truly is. Without measures the same goal is understood by a hundred different people in a hundred different ways. As a result, team members get off track doing things that might be urgent but are less important. They work at an uncertain pace and motivation wanes.

Winning is a vital part of our culture. **Winning requires scoring.** As a part of winning, in life or business, we have to have something to measure. In businesses and organizations,

keeping the "Right" scoreboard in front of the team is vital.

Note: There's a difference between a Coaches (you) scoreboard and a Players (your team) scoreboard.

Note: There maybe different types of players in an organization needing different scoreboards.

All effective scoreboards should follow the following characteristics:

1. Easy to understand and identify where you are (the players' progress) at any given time **at a glance**.
2. Only the necessary information is displayed. **Very informative & not cluttered.**
3. The Scores are to be **updated consistently**. If you have automated tools, daily updates are desirable. If not, assign a cheerleader.
4. The scores are directly influenc-able by the performance of the project team. That is, **the score is tied to what they do**, and plan to do in the ensuing days/weeks.
5. Which brings us to the most important point, the scoreboard inspires, nay **compels the player to act.**

For your consideration:

"If you're interested in the living heart of what you do, focus on building things rather than talking about them."

~ Ryan Freitas



You will often have to do some trial and error regarding this. Be OK with this and be open that it's a process. This creates a more playful awareness and interest from the team to consider solutions.

Item number 4 above is the main driving force to make a scoreboard inspiring and compelling - the fact that one's action directly influences the score allows that person to get committed and immersed in the game. Although, in terms of making a scoreboard compelling, a little creativity also contributes significantly.

In sum:

- Keep the data accessible, easy to see.
- Keep the visuals easy to "get".
- If I'm in logistics don't tell me how Mary in accounting is helping. Tell me that at the company picnic later. Right now, tell me if I'm on target.
- Keep me posted on my progress.
- Could you make this a little fun?

Who cares?
How can they help?
How will you show them they're helping?

OK, Goals on the table.

Watch this 15-minute video on The 4 DX - <https://vimeo.com/219867918/2c29a25780>

Document: What scoreboards will you use?

Document: Who will be in charge of:

- Erecting
- Caring for
- Data collection
- Data dispersion
- What else?

I urge you to make these processes easy to execute.



Note that this scoreboard is valuable to you the observer, not to the players. The players have a live action coach spotting them.





Goal setting is the most important activity you do for your company. Take your time. Do it well.

Drill down, drill down, drill down and then honor the results at that level in real time.

LEAD MEASURES¹

Later, we'll discuss ideas for motivation and clarity. One of them is the idea of the "future you movie". If you take advantage of this concept (which I hope you do,) just after playing your movie a couple of times is a great time to reflect and return your attention to the present time.

Whatever tools you use, now you want to dig deep and be in present tense. Looking at your goal from there to here and from here to there, begin to write down the big steps or milestones.

Do they have time-lines or triggers? Write them down.

It's time for your lead measures.

It is your lead measures that determine your action now. And it is your action now that will move you forward towards your goal(s).

Lead Measures are both predictive, meaning they lead to the accomplishment of the Lag Measure or goal, and influenceable, meaning you can do something about them, be responsive to them. Lead Measures are about narrowing your focus down to the 2 or 3 things that "trigger" success, or your end goal.

Some Examples:

Specific Goal - Grow sales volume (not margin) in online store through new customer acquisition by 30% in 6 months.

SWAG Lead Measures -

- Number of subscribers to an eNewsletter
 - Create an opt in campaign
 - Facebook
 - Postcards
 - Purchased list for direct emailing
 - Offer a drawing to new subscribers
 - Check out perk
 - Referral perk
 - FB

1. <https://ericbrownsblog.wordpress.com/2010/08/23/lag-vs-lead-measures-why-knowing-the-differences-are-important/>
<https://ianjseath.wordpress.com/2009/08/26/lead-vs-lag-indicators/>



- OTO
- Postcards
- Coupon distribution
 - Activity
 - Activity
 - Activity
- Referral codes (B to B)
 - Etc...

Specific Goal – Release 40#s in 90 days.

Lead Measures -

Note: These are not SWAG measures. There is enough documentation on what works we do not need to guesstimate. We know. (Over time, when you track your data, less and less SWAG takes place. YEAH!)

- | | |
|----------------------------|-----------------------|
| • Calorie intake | • Calorie burn |
| • Protein ratio | • Meal times |
| • Carbohydrate consumption | • Water and hydration |

Specific Goal - Reduce number of accidents for a construction company (Could be sub-goal of a WIG - To Increase Safety Rating from X to Y by End of Year)

SWAG Lead Measures -

- Create a list of 9 (3 per primary department) key safety standards.
Possible ways to get that list:
 - Ask managers, 1:1 or group, in each dept. where they see systems failing
 - Ask all working staff (in meeting, memo, survey or 1:1):
 - What tools they could use to more easily/safely do their jobs
 - Where they think the bottlenecks are in their systems

Lead Measures:

- Educate staff and managers on:
 - The personal (not your costs) costs due to accident (time off work, long term physical concerns...)
 - “How to” of many activities
- Educate managers on:
 - The company costs due to accident
 - “How to” of many activities

For your consideration:

"I try not to make any decisions that I'm not excited about."

~ Jake Nickell

For your consideration:

"Timing, perseverance and ten years of trying will eventually make you look like an overnight success."

~ Biz Stone

Note: It is very probable that you are now beginning to think that one really big or Wildly Important Goal might very well be enough. If so, go with your gut.

Read the articles (there are 2) linked to the footnote on the previous page.

Looking at every department or area of execution in your business, what are the no more than three lead measures you will have each area develop and become responsible for?

If you don't know yet, list how you intend to find out.



Now for co-creation and co-production! Helping your people help you.

What systems, what language, and what structure will you define as support, guidance, mentorship.

What does Being Accountable look like?

Accountability is not something that can be given or assigned to a person. Instead it is something that you must take on yourself. It is the ability to claim your actions as your own and to be able to reason why. Therefore, it is something that most of your team must be taught. And you know the best way to teach... by doing. This is the kind of behavior being referred to when the statement "Lead By Example" is used. Ways of being, not working your fingers to the bone, is how one leads by example.

I have seen many managers and teams chronically fail to carry out commitments or achieve promised results, yet be convinced they work in a culture of high accountability. How is that possible?

We've stated that being accountable comes from within, not without. Yes, people can be held accountable and they can be disciplined or terminated, but that is not the same thing as being accountable. I don't want a team that needs to be threatened in order to keep its promises, do you? It never works in the long-term anyway.

People who are accountable make commitments and they stretch. People who are accountable understand that when they agree to get something done by a certain date they are making a promise. These people don't say, "I'll give it my best shot and I guess we'll see" They don't lay the groundwork for failure and excuses in the very moment when they are making the promise.

NOTE: Accountable people do NOT wait until they are 100% sure of success to commit. They are simply willing to go all in and share what is and what is not working in real time. In other words, to be vulnerable, to have full disclosure and exposure.

People who are accountable have at least a loose plan. When they are asked to commit to something, they think it through. They likely have a pretty good idea of how they might get the job done. If they think the allotted time is too short, or don't know how to do the job, they say so and give a rational explanation.

They don't quickly and thoughtlessly throw out dates, miss them, and then rationalize that it is acceptable because, "I didn't know what it was taking on."

For your consideration:

"I see things in the present even if they are in the future."

~ Larry Ellison



You are still
building your
goal. You will
execute soon
enough.
Keep
thinking!

People who are accountable raise a red flag as soon as they see that their commitment is at risk. They care about keeping the promise and they know that the sooner they communicate a problem the more time the team has to help keep the commitment or to adjust to a new promise date. They don't give their bosses, associates, employees, or clients ugly surprises.

People who are accountable don't need a boss to expedite them, or monitor them in order to ensure a commitment is kept. They are their own taskmasters and their own expeditors. They don't want to let anyone down, they don't want to break a promise and they will do what it takes to make sure that doesn't happen.

*Are you accountable? If not, what do you want to change. If anything? Let's get really clear here. **You don't have to change.** AND. If you are not an accountable person you will not have an accountable team. PERIOD.*

What about your Team(s)?

- When the first time you learn a promise won't be kept is on or after the day it is due, you are not dealing with accountability.
- People who are accountable don't point fingers at coworkers or other departments when a commitment is missed.
- If coworkers or other department heads don't support keeping an important commitment, people who are accountable take the immediate initiative to schedule joint meetings with them and the highest level of management necessary to cut through the resistance, get people moving and get the job done.
- People who are accountable don't whine to their boss or coworkers about how hard they have to work to keep their promises and they don't make excuses. They know how hard they are going to have to work when they make the promise and they accept the task.
- They don't make excuses and try to duck their accountability because their accountability is intrinsic – there is no escape.
- People who are accountable don't need to be lavished with praise and celebrations when they keep a promise. They expect to keep their promises. They want to be thanked and they want to be compensated.
- An individual like that will run rings around his or her less accountable coworkers.
- A team like that will move Heaven and Earth and then seek a bigger challenge.

This is why ACCOUNTABILITY is the only attribute repeated in two of the three SMART working Models. It is an absolute necessity for supreme success; of humans, of teams, of companies, of societies.

Read this Article - <http://www.artofmanliness.com/2009/04/07/living-a-life-of-integrity/>

Book a coaching session with me and in the notes share what has come up for you through this thinking. Offer ALL the information you can including what hit a nerve and what you want to accomplish. This is a very personal developmental experience. Let's put a very personal program together for you.





How will you hold yourself accountable to supporting your requests of your team?

For your consideration:

"If you are not embarrassed by the first version of your product, you've launched too late."

~ Reid Hoffman

Team play and co-creation.

A special note...

Delegation!

It is a common practice to, at this point, determine your goal building is close enough to complete and that you and your team are responsible enough to skip this step.

I strongly urge you to be uncommon.

I urge you to instead, trust the system. Trust it to shore up all participants, including you, against the whirlwind of your daily business activities.

In other words, this is a key core element. Let's face it; there are only five elements to this system. They are all key and core. Simply work the process to its completion.

Delegating requires enough time and support from you as a leader so everyone can be successful as a participant. Delegation is a key part of empowerment, and your team is stronger, as a team and as individuals, when you do so.

Your failure to support the execution and follow through of your delegated tasks is one of the gravest mistakes you can make when leading a team.

Rule 1: Not all tasks can be delegated.

Rule 2: Be clear as to whether you're delegating or abdicating. (def: fail to fulfill or undertake)

Tip: As you delegate more and more, get into the mindset of professional development. Figuring out what your employees would like to do, what they want to be better at to fulfill their jobs and grow.

Asking the following types of questions about yourself is a great place to start. Then follow up with each employee:

- What areas of the company interest you most?
- What skills would you like to improve or learn?
- What is your goal for your career progression?
- What do you see others doing that you'd like to try?

Rule 3: Existing tasks, that could possibly be delegated include:

- Routine administrative tasks like regular administrative reports, filling out paperwork, claims sheets, gathering data; most clerical duties fall in this category.



How well do you manage you?

BIG Tip:

Consider the difference between a project and task and when the transition happens.

What milestones will trigger that change in systems and what changes will take place?

Create a transition phase from project to the new normal.

Use your team to determine what it is.

BIG Idea:

Top Tier Strategy

You can't do it all AND dilution happens really easily, really fast. Having a "common enemy" through all departments, weaving in all staff is highly advantageous. When pondering your goals consider choosing a Top Tier Strategy. The bottom line is that there are only five ways to make more money.

- . One is to increase lead generation: to gain more awareness of and interest in your "widget".
- . Two is to increase lead conversion: the % of those leads who become customers.
- . Three – increase the price point of your widget.
- . Four – the frequency of purchase.
- . Five – reduce your expenses.
- . A part of this strategy is to increase your efficient use of the money you collect and this comes in all shapes and sizes: operational, administrative, managerial. Some examples of that would be tight inventory controls, a well-negotiated lease agreement for your property, renegotiated credit card fees, and more.

I suggest that when choosing your (especially at first) goals, you do so under the umbrella of one Top Tier Strategy or one "enemy". It makes the commonality between departments more easily identified and often leads to quippy sayings and slogans. All good elements to keeping the game afoot!

- Standardized decisions and tasks – ones that have well defined rules and parameters.
- Jobs you expect employees to do when you are on holiday – this indicates they are fully capable of handling the authority and responsibility.
- Jobs that will facilitate employee development - if they would be expected to do it to earn a promotion - they should be given the chance to do it now.

Rule 4: Use a delegation tool, such as the one provided, to help you sort out all the part of a project or initiative so you remain on top of it. Don't do, or chase, details and, keep your team accountable to completion.

Rule 5: KEEP A DELEGATION LOG! Keep it in or near whatever self-organizational tool(s) you use.

Whatever systems you use to keep yourself on task, on point and on time can always be improved. Know this and spend some time analyzing your weak spots and considering what change(s) might be effective.

Embrace that if you as the leader are having issue with time management and follow through, what on earth could your staff and team be encountering? They often don't have half the guidance and resources you do. Depending on your industry, structure and teams' educational levels you could be their ship, their captain and their northern star. What an honor!

- Write your thoughts & actions now?
- What came up for you in this section?
- What systems do you want to shore up?
- Any ideas on how?
- How will you change your behaviors to support your team?
- Write it down!
- Watch this short lecture by Michael Bungay-Habits - <https://vimeo.com/22004415/3afb3b6e01>

Relevance. What does that mean really?



Is your company relevant to its audience?
How do you define this?

rel e vant



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/ˈreləvənt/

adjective

closely connected or appropriate to what is being done or considered.
"what small companies need is relevant advice"

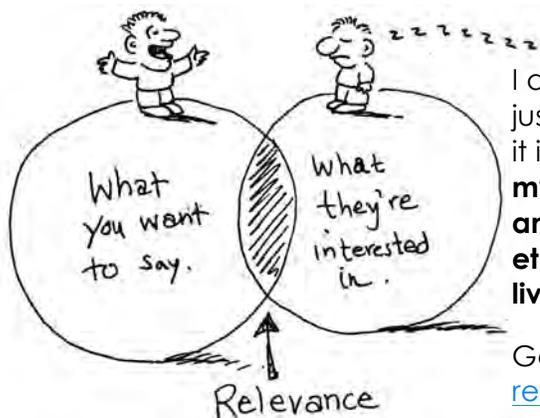
synonyms: pertinent, applicable, apposite, material, apropos, to the point, germane

appropriate to the current time, period, or circumstances; of contemporary interest.

"critics may find themselves unable to stay relevant in a changing world"

"Your purpose is to make your audience see what you saw, hear what you heard, feel what you felt. Relevant detail, couched in concrete, colorful language, is the best way to recreate the incident as it happened and to picture it for the audience."

~ Dale Carnegie



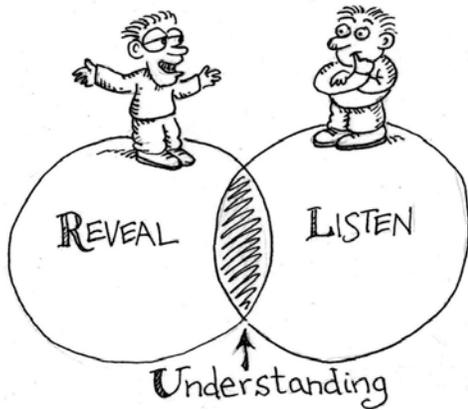
I am "borrowing" the following segment from Geoffrey James as I just cannot say it better myself. The only thing I want to add is that it is high time we accepted that **corporations are not some mysterious energy or entity of their own. They are a reflection us, an extension of us. Us as the members of that tribe, us and our ethics, us and our integrity, us and our intentions and willingness to live into these very valuable elements of being human.**

Geoffrey is a contributing editor to Inc. magazine and you may [read his full article here.](#)

[Styrlund and Hayes have authored a book](#) he and I reference that book and their "recipe for relevance." A condensed version:

1. Be More Authentic

Being authentic entails knowing who you are at the deepest level, "being" that person in your internal thought processes, and finally appearing to others as you are, without pretense or phoniness. Authenticity is the foundation of relevance because if you don't understand who you are, and where you're "coming from, you can't possibly lead or influence others."



2. Achieve More Mastery

Mastery is essential because, if you have no useful skills, you cannot be useful to others. Mastery goes beyond mere competence and skills. It means approaching one's life and relationships as an act of creation, rather than a reaction to people and events. It means approaching lifelong learning with a sense of fun that adds pleasure and energy to the tasks at hand. It means expanding your principles and practices so that they serve a greater purpose.

3. Be More Empathetic

Empathy is the capacity to recognize and, to some extent, share feelings being experienced by another being. It is the source of compassion, caring for other people, and the desire to help. It means the ability to experience the same emotions that another is feeling, without unnecessary judgment. Empathy creates relevance because it creates the deep connection that brings people together.

In business, there are three levels of empathy.

- The first is "on-demand" empathy, which is the ability to sense what customers want.
- The second is "solution" empathy, which entails understanding a customer's problem and figuring out how to address it.
- The third is "transcendent" empathy where you create solutions to problems that customers don't even know that they have.

4. Take More Action

It is your actions, ultimately, that make you relevant to others. All the authenticity, mastery and empathy in the world remain sterile, until and unless put into motion. It is through action that you change yourself and change the world. Without action, even a great and brilliant mind and soul remains entirely irrelevant.

Is your widget relevant?
Is your company's conversation relevant?

Who are you asking? How else will you find out?
 Action has four elements: impetus, vector, acceleration and velocity

What's your company's dress code? Conversational style?
View your company as though it were a new audience and detail what you see.

Write this stuff down!
 Velocity is the direction your action takes you: either towards your goal or away from it.

This lecture discusses one's "signature voice" and I argue this is a relevant conversation for your company and team

Acceleration reflects your level of commitment and how much action you're willing to take.

- Velocity is the energy that carries you forward, even when you're not



For your consideration:

"Either positive or negative comments are good because it shows I'm still relevant."

~ Justin Guarini





How do you keep others paying attention to what you want to look at?

How do you help them care about your vision? Find a way to make it theirs!

Top of Mind

This certainly is not a concept we need to discuss for you to understand. **Do not mistake easy for done or obvious.** Instead, appreciate you got a break and plan how to accomplish this.

This is not a full on strategic move so don't over complicate it. This about tactics and conversations. There is simply no other way to get buy in but to share what your trying to accomplish with enough conviction that others get as excited as you do about reaching the goal.

Lucky for you, most of us very much want to be a part of big things, of making change, of being successful. Generally, we want to help and to care. And again lucky for you, your teams, employees and associates spend a heck of a lot of time at work too and would LOVE to say to their peers, "Hey, that time vacuum I'm in? We kicked behind on our last initiative and I played a key role and got a little bonus too. May I buy you a beer?"

Consider reviewing my 42 page Marketing Tactics (Not to be confused with Strategies) Workbook for idea generation on actions you will take and tools you will use to share and gain support for your company goals.

Also consider:

- Why are they the goals?
- What will your company and people get out of these changes?
- How will your teams' lives improve if these new goals are achieved?
- What will it mean for you?
- For the future?
- What else?

For your consideration:

"If you are not embarrassed by the first version of your product, you've launched too late."

~ Reid Hoffman

Watch this lecture with DJ Mitch based on her book "Zombies and Zealots" - <https://vimeo.com/220062520/3732b5b04d>

Talk, listen, and respond.

Some additional tools you might find helpful... Get your woo-woo on.

The PURE Model

I like to add a layer of PURE onto my company and personal goals

POSITIVE: Be as true to yourself/your team as possible about the outcome you want.

By building a complete picture of the effects of your goal above and beyond its service to you and creating a strong internal representation of it, you make the difference that speeds you to success.

- Does your goal serve a higher purpose?
- Does it generate results that affirm your belief system?
- Does it **not** do either of the things above?
- Will the outcome have any unintended consequences, negative or positive?

UNDER YOUR CONTROL: Be sure you can affect your goals.

- Have you chosen a goal that is something you/your team can actually affect?
- What resources do you need to achieve your outcome?
- Are other people involved? How do they need to contribute?
- Is all this within your power?
- Do you need to make some changes to get the power?

Potential Hidden Blocks:

Simply, quite often we miss our mark because our goal, no matter the face value, does not serve elements of our other or greater objectives, usually personal.

We sometimes don't achieve our desired outcomes because something within us holds us back, and sometimes we may not even be aware of what that is. So, until you ask yourself the right questions, you may not know that you need to change your attitude or your approach. Check your current state.

Questions to help you uncover hidden blocks:

- What do you get if you don't achieve your outcome?
- Are there any physical, emotional or psychological "pay-offs" if you fail to achieve your goals?
- Do you need to give up or change anything to move toward your outcome? And, is that a problem?

Once you become aware of these things:

- Are there any actions you could take to eliminate or minimize these blocks?
- Are there any actions you could take to eliminate or minimize your perceptions?





“What good is an idea
if it remains an idea?
Try.
Experiment.
Iterate.
Fail.
Try Again.
Change the world.”

~ Simon Sinek

RIGHT SIZE: Embrace getting uncomfortable - without pain.

- If you've goal set in the past and generally met your goal consider raising the bar. And, visa-versa if you usually don't.
- If you don't have enough experience to know, move on.

ECOLOGICAL: Be a spendthrift with all of your resources.

- Does attaining your goal take an inordinate amount of resources, use an inordinate amount of funding, or require an inordinate number of "casualties?" If so consider the necessity of these sacrifices.

I urge you to reflect on your goals in the following light before going live with your new projects. Then, allow yourself to move on, and focus your mind on moving forward.

1. Put your goal into words as if you've already achieved it. Make it a positive statement. Don't say that you don't want something or that you can't do something. Ask yourself what you want or what would happen if? And then turn that into a statement of gratitude.
2. Create a strong internal representation. Your mind does not discern the difference between what's real and what's imagined, what's inside vs. what's outside. Creating a strong internal representation of the sights, sounds, and feelings you'll experience when you achieve your goal moves you toward that goal.

The Future You, Your Movie -Integrate your outcome. A five-minute exercise.

Sit comfortably, breath deeply a few times, force a yawn, close your eyes and...

Imagine you've met your goal. Imagine the place, the people, and the sights and sounds and feelings you are experiencing. You are there right now. What are you wearing? What is the weather like? Where are you? Who is with you? How does it smell? And, what else?

Key Points

To help you achieve your goals – and your dreams – start by **writing** a SMART goal. Check that your goal is positive, under your control, right sized and ecological; and check your current state by ensuring that you've eliminated any internal barriers that might stop you from achieving that goal.

Then use mental imagery to create a strong internal representation of what you will see, hear, and feel when you achieve your goal. Then ask further questions to ensure that your goal is well formed.

All of these steps and you develop a strong, powerful, motivating and compelling goal, making it one that you are willing to work hard for and will achieve.

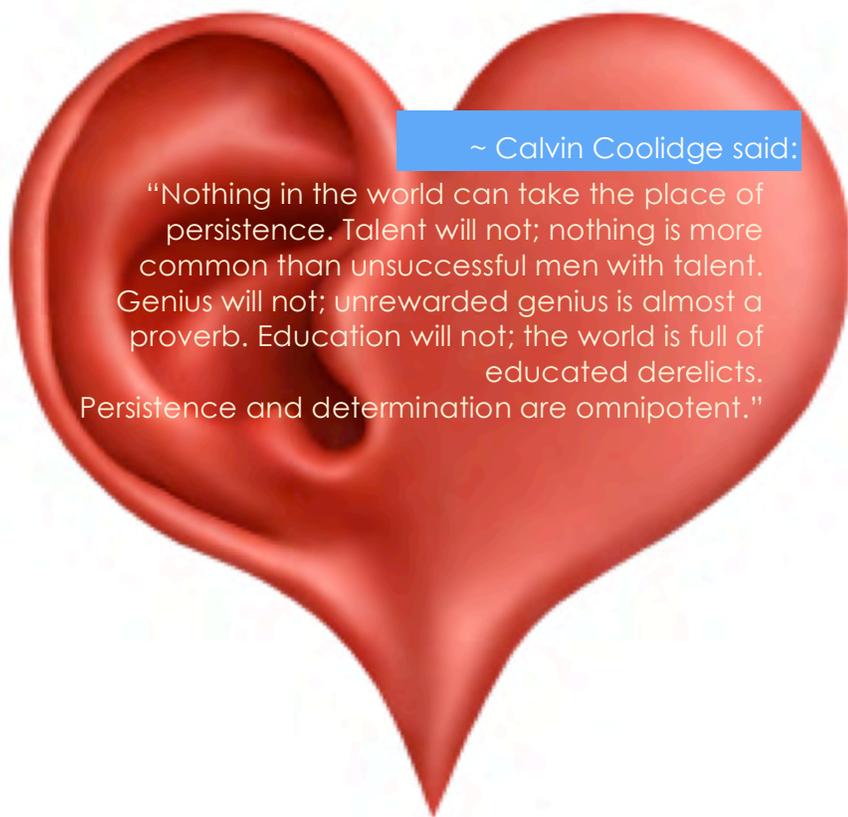
I, Kat Nesbit, have worked with companies doing business for more than 10 years that didn't know how to set effective goals.

I have worked with companies grossing AND netting millions of dollars per year that did not know even the basic metrics of their success and thus, how to set new agendas for their team.

In fact, this is at the core of these companies' interest in working with me.

Do not feel awkward if you do not yet know what your effective lead measures are and/or how to gather that data in a systematic, consistent fashion. Do not feel awkward if you haven't mastered in just two weeks how to build (not to mention implement) the 4DX model for success.

Embrace that **today is the day to start.**



There are three philosophies I very much hope have weaved throughout this lesson.

ONE: No matter what you were taught in school or at your workplace, it's clear and communicated directives and nothing less that drive a sound business.

TWO: Leading a company is a bold and courageous endeavor requiring a myriad of vulnerabilities and skills. Like it or not, you are not alone.

THREE: Goal setting should be allowed to stew and simmer, should not be rushed, and is best accomplished with conversations and team.

Goal Setting is the first bold step in a business' development. It forms the foundation for the long-term value of an organization to its employees, customers, markets, relationships and, to the scope of its leaders' choosing, its influence on the world.

Prosper and contribute with abandon!