

TeamStrength Snapshot Letter

For over 20 years, TeamStrength member CEOs & Executives have used the letter-writing process to ‘begin with the end in mind’ and accomplish more. Crafting a snapshot of your business and personal progress one year in the future – writing as if you’ve already achieved specific goals – is a highly unique, effective planning tool. It provides clarity, forces you to really look at how you achieve specific goals and helps you understand the impact of hitting the targets – increasing commitment or fine-tuning the goals.

DESCRIPTION/INSTRUCTIONS

This is a letter to yourself, dated one year from now, written in past tense about the key events and accomplishments of the year. It is narrative and descriptive – citing quantitative results, steps, and impact. Some guidelines:

1. The most important piece is the visualization – **put yourself in the future and look back**. Don’t write about goals, or use future tense (will, want). Write as if it’s already happened (achieved, completed, celebrated, accomplished). Make sure you’re writing in past tense!
2. Make sure your business goals **align to overall corporate goals**. Clarify this with your CEO/Executive manager.
3. The **goal designing** categories and questions can help identify areas of focus.
4. Limit yourself to a very few **breakthrough/critical goals**. Clearly identify these, and include the most narrative addressing these areas. Include a longer list of **maintenance/additional goals** that are areas where you’ve already made progress and want to continue to build. Write less about each of these.
5. Include a **key personal goal** for balance and to share with your team for support and encouragement.
6. Remember to include **steps to accomplish each critical goal** (and write these as if you’ve already done them, of course). The more specific ‘how’s’ you put in the letter, the more likely you are to achieve your goals. Put when each step happens with specific dates. Name the names of those on your team who were instrumental.
7. **Layering** is a great technique – begin with bullet points on key goals (in past tense). Then add paragraphs with details. Then go back and add more. Write in more detail about a short list (2-3) of breakthrough goals. Write in less detail about lower level, maintenance goals.
8. **Link to longer term goals**. Include some reference to where you’d like to be in 3 to 5 years or longer.
9. **Stretch and aim high, but be realistic**. The letters should reflect how you want things to be, though not overly idealistic. It is not expected that everything included in your letter will turn out exactly as written – the goal is to accomplish more in the next 12 months because you crafted this vision.
10. The goal of the letters is to achieve more in the next 12 months because you wrote the letter. And it happens every time!

Goal Designing Categories - Personal

Health

- Is your weight within 10% of your target?*
- Are you managing your energy, BMI, blood pressure and cholesterol?*
- Do you have a regular fitness regimen you practice most weeks of the year?*

Key Measures: weight, BMI, blood pressure, triglycerides, cholesterol, resting heart rate, recovery time, flexibility, strength, annual physicals/screenings.

Family

- Do you have 1-1 'date' time with your spouse most weeks of the year? 1-1 time with kids?*
- Does your family practice daily, weekly or monthly rituals (family day, game night, dinners out)?*
- Do you have weekly and annual recreation time as a family?*

Key Measures: Number of weeks with date nights, number of family dinners/week, quality & quantity of vacations, new/continuing family rituals, time with parents & siblings.

Growth & Development

- Do you read for personal enjoyment and/or professional growth each week?*
- Do you attend professional training at least once a year?*
- Have you learned something new or taken up a new activity in the last year?*

Key Measures: Number of books read, classes or workshops attended, awards and recognition within company and community, new areas of interest/hobbies.

Social & Spiritual

- Do you get together on a monthly basis with extended family or friends?*
- Do you participate in a regular group activity? Engage in religious services?*
- Are you satisfied with what you're giving back to the community?*

Key Measures: Time with friends and extended family, participation in non-work groups – sports, church, community, volunteer activities.

Recreation & Renewal

- Do you do something most days just for personal pleasure, relaxation or renewal?*
- Do you make time most weeks for recreational activities you enjoy?*
- Are you taking regular vacations where you disconnect from your day-to-day?*

Key Measures: Times each week you do something just for you to refresh/renew, outside your day-to-day demands, number of weeks you engage in a recreational activity of your choice, number of vacations each year.

Financial Security

- Do you have a plan to increase earnings/net worth?*
- Are you satisfied with your investments and debt?*
- Do you have updated retirement and estate plans in place?*

Key Measures: Increased net worth, diversification of assets, debt retirement, vacation or college fund, retirement/estate plan.

Goal Designing Categories - Business

Vision

Do you have a clear, measurable goal for your company or department?

Does every member of your team have a clear picture of where you're headed?

Is there a regular planning process to achieve results in line with the goal?

Key Measures: Clearly defined goal(s) known by entire team, overall sales growth, market share growth, profitability increases, increase in customer base, client retention.

Strategy & Service

Do you continue to develop your competitive leverage or differentiation in your market?

Is there a regular process for developing/improving products and services and identifying new markets?

Do you have a system for measuring and improving customer satisfaction?

Key Measures: Sales growth, market share growth, new products/services, customer service scores, geographic expansion.

Team

Do you have 'A' players in every key role?

Is the overall team stronger than a year ago?

Are your employees engaged, aligned to the culture and committed to the success of the company?

Key Measures: Team performance and incentive compensation, # of 'A' players in place and on the-bench, retention of key players. Ability to fully staff, employee retention, employee survey ratings, employees' referrals, incentive and profit-sharing payouts, participation in company events.

Customers

Is your sales process consistently able to bring in new business and grow the company?

Do you have a measurable way to track customer satisfaction? Is it improving?

Are you able to attain and retain customers with increasing margins?

Key Measures: Growth of sales, retention of sales, service, marketing employees, customer survey scores, client retention, customer referrals, average sales amount per customer, increased market share and margins.

Financial Performance

Are you growing revenue and profitability?

Is your business performing within 10% of projections this year?

Is profitability at or above your industry standard?

Is your team measurably delivering better financial results?

Key Measures: Net profit/EBITDA, revenue growth year-to-year, same location sales, revenue per employee, key expenses as percentage of sales; department metrics.

Systems & Structure

Does your team meet or exceed customer satisfaction consistently?

Are key measures of quality and productivity improving?

Do you have capacity for continued growth at the current pace for three years?

Is there a systematic way your company explores improvements in product & service delivery?

Key Measures: Productivity, customer lead times, error rate, on-time completions, waste, accidents/safety, capacity for growth.