

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.

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.