

CREATING A COMMON FOCUS

A VICTORY GUIDE

James H. Saylor

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FORWARD

This book is part of the VICTORY series. For over 30 years, the pursuit of a simple, easy-to-use, proven, inexpensive management system for any organization has been my focus. MANAGING FOR VICTORY™ is this system. MANAGING FOR VICTORY™ system includes:

Visioning creates a common focus

Involving everyone establishes a superior organization

Continuously improving achieves excellence

Training, educating, coaching, facilitating, mentoring develops a learning culture

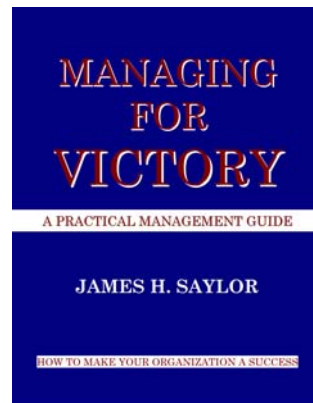
Owning the work fosters empowerment

Recognizing and rewarding builds high performance

Yearning ensures success

Customers drive VICTORY

Progressive Leaders guide VICTORY



ABOUT THE AUTHOR

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CREATING A COMMON FOCUS

POWER OF PURPOSE

Creating a customer-focused vision is the first essential element of VICTORY. Focusing is a critical basic organizational principle. In every organization, there must be a focus that everyone in the organization can rally around. There must be a constancy of purpose throughout the organization. The focus of the organization provides a common cause to engage the minds and the hearts of the people in the organization. The focus provides the common reason for joint action. When aligned in the organization, the vision, mission, values, plans, and goals provide a common purpose for all to follow.

The vision, mission, and values form the common purpose or focus of the organization. Figure 1 shows the relationship of vision, mission, and values of the organization. The vision is where the organization wants to be in the future. It provides the strategic intent for the organization. The mission states what the organization wants to accomplish. This forms the foundation of the business plan. The values of the organization describe the principle beliefs of the organization. The values indicate the organizational culture.

Creating a Common Focus Considerations

Focus on the future with a vision

Orient everyone toward a common mission

Communicate principles with a value statement

Use a strategic planning process

Seek action

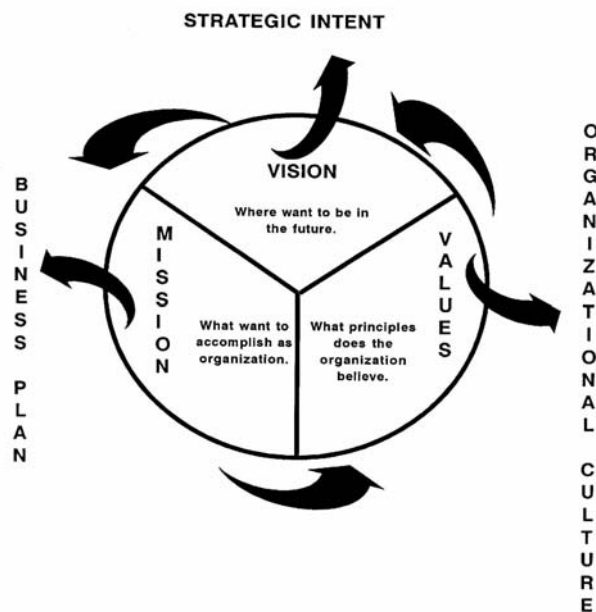


Figure 1 Vision, mission, and values.

Focus - Focus on the Future with a Vision

Vision focuses on the future.

A vision is the organization's view of the future. It provides the focus for the journey of the organization. The vision provides a future state for the organization to strive to reach. The vision expresses the ultimate "image" of the organization in the future. It should reflect the continuous quest for excellence within the organization and constant pursuit to fulfill customer expectations.

A vision must be developed by top management to indicate where the organization wants to go. Leadership is essential to make the vision a reality. Leaders are not expected to have all the answers. Leaders simply guide the organization toward the vision. They must convey the importance of each individual in the organization and the role each contributor serves in making the vision a reality. This type of leadership is required throughout all levels of the organization. The leader may provide the guidance, means and encouragement; but it is everyone in the organization who makes it happen.

Vision reflects the future state of the organization and its potential to establish long-term relationships with its' customers. Customers must drive the vision.

Vision is articulated first by top leadership, and then worked through the organization. The vision must transcend the organization. This is accomplished by communication. The vision must be continually communicated through all means possible, and it should be repeatedly reinforced during all group gatherings. The status of the vision should be reported in information systems, newsletters, periodicals, and other organizational media. Vision considerations include:

View of the future

Institute the vision within the organization

Set the example through leadership

Include where the organization wants to go in the future

Orient toward customers

Nurture through constant communication

Focus - Orient Everyone toward a Common Mission

Mission is "what we are in business for."

The mission describes the basic purpose and expected results of the organization. It sets the common purpose of the organization. For a corporation, the mission describes the corporate view of the role and function of the organization in satisfying customers' expectations today and in the future. For a public agency, mission derives from constitutional or legislative mandates and executive requirements. Mission statements further detail how the organization is going to fulfill its public mandate. For a business concern or public enterprise, the mission is a function of the view of what lies at the core of the organization.

Since satisfying the customer is the primary purpose of all organizations, the customer must drive the mission. In addition, the mission includes the purpose, the common direction and expected results. Therefore, all stakeholders should be involved in developing the mission. This opens and maintains communication. Finally, the mission needs to have a long-term orientation. Mission considerations include:

Must be customer driven

Includes the purpose of the organization

Sets the common direction

Sets the expected results

Involves all stakeholders

Opens and maintains communications

Needs long-term orientation

Focus - Communicate Principles with a Value Statement

What you believe is who you are.

Values are important to guide the conduct of the organization. Values include the principles that the organization believes and follows. Values are the collective concept of what is important and what is "right" about the organization. Values derive from the ethics of the organization. Values lead organizational culture. Typically, values bring to the surface issues of honesty, trust, and integrity. They describe ways of communicating within the organization. They guide constructive relationships with the competition, suppliers, and customers. Values generally establish ground rules for producing on the promise of the organization. They support the quest for excellence. Values have to do with the rights and privileges of management and employees and set the tone for policy and procedure. For instance, if the organization values an internal communication system that designs and develops projects

through "concurrent and parallel work," it states this value in its core value document. Values considerations include:

Views of what is right in the organization

Appears in peoples' organizational behaviors

Leads to organizational culture

Uses organizational ethics, honesty, integrity and trust

Encourages constructive relationships

Supports the quest for excellence

Focus - Use a Strategic Planning Process

Strategic Planning involves plans to make the organization's focus a reality. Figure 2 graphically shows the Strategic Planning process. Strategic planning involves determining the gap between today and the future, and then deciding what needs to be done to get from where you are now to where you want to be in the future. Once the organization determines the gap, the organization takes action to achieve the future state. Strategic plan considerations include:

Provide understanding of where you are today

Learn where you want to go in the future

Analyze how to get from today to the future

Navigate to get to the future state

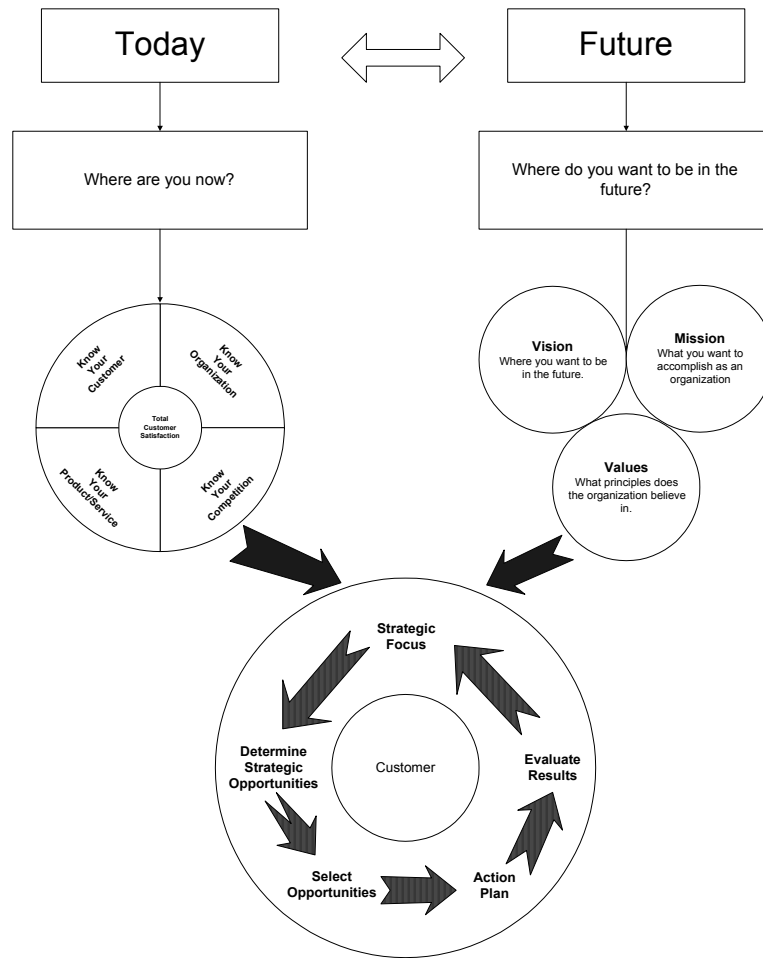


Figure 2 Strategic planning process.

Plan - Provide Understanding of Where You Are Today

The organization needs to know where it is before deciding where to go.

In order to understand where you are today, the organization performs various assessments. The assessment of the organization starts with the focus on total customer satisfaction. By knowing its customers, the organization focuses the development of relationships to keep and gain customers both internal and external. In addition, the organization must know itself, its product/service, and the competition. By knowing itself, the organization understands what it can do to satisfy its customers. By knowing the product/service, it allows the organization to position the deliverable to maximize total customer satisfaction. By knowing the competition, targets can be established for gaining advantages in the marketplace. Figure 3 shows the elements that must be assessed in order to achieve total customer satisfaction. All of the elements must be assessed with the environment in mind.

Know Your Customers

Find out what your customer values.

This is the essence of VICTORY. The customer driven organization knows its customers best. With the customer as the driver of the organization to include products and services, the organization knows its customers intimately.

There are many ways to know your customer. You can do market research, focus groups, and many other methods. There is only one “best” way to know your customers. You must communicate and especially listen to them. You must make personal contact with as many customers as possible. It is particularly important to have dialogue with your major customer(s) or customer base. There are too many organizations that do aloof customer intelligence or they believe they know what is best for their customers. These organizations will never reach perpetual prosperity.

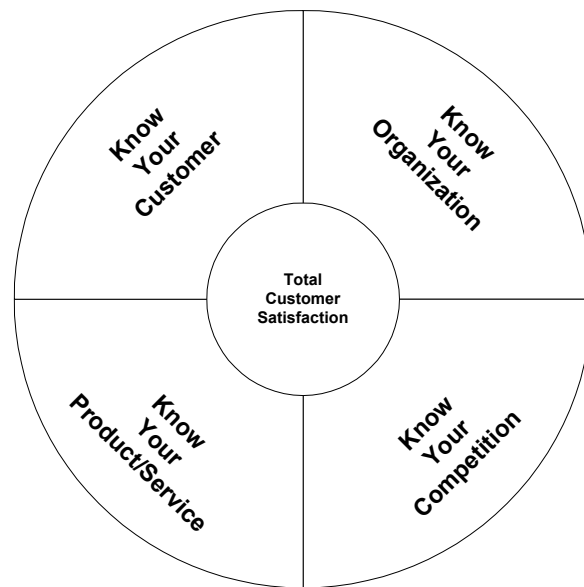


Figure 3 Elements for assessment.

Know Yourself

Find out what you are and what you can give.

The organization must know itself to achieve organizational excellence focused on total customer satisfaction. In the process of knowing yourself, the organization looks inward to its organizational culture and internal processes. In this process, the organization is examining its own way of doing business.

It must examine its culture to discover the true nature of the organization. The organizational culture includes: language, behavioral norms, ceremonies, informal and formal social and work process, organizational management style, reputation, image, philosophies, values, attitudes, beliefs, assumptions, and traditions. The organizational culture has a major impact on performance of any success effort. The organizational culture affect the following:

Communications, internal and external

Unity for cooperation and teamwork

Leadership and followship styles

Time and urgency factors

Uniqueness in the marketplace

Relationships

Effectiveness, efficiency, productivity, and quality

In addition to its specific culture, the organization must know its internal processes. Internal processes focus on getting the work done with desired internal quality while

targeting total customer satisfaction. Each customer in the organization must be satisfied. However, unlike the external customer, the internal customer may or may not be a person. The customer could be a person receiving the output of the job, or the customer could be the next process, the next task, the next activity, the next job, the next machine, or the next piece of equipment. To satisfy internal customers, all the processes in the organization must be understood, measured, and analyzed to determine existing performance.

A major aspect of the performance in an organization is its ability and willingness to achieve the ultimate goal. The organizational culture and internal processes play a critical role in the willingness and ability of the organization.

Know Your Product/Service (Deliverables)

Deliver what the customer values plus.

The organization must know all there is to know about its product to achieve total customer satisfaction. This includes knowing all the aspects of the product. The product is an output of a process that is provided to a customer (internal/external) and includes goods, services, information, etc. The product is all aspects contributing to customer satisfaction. This can include such items as: product quality, reliability, maintainability, availability, customer service, support services, supply support, support equipment, training, delivery, billing, marketing, etc. Again, every one of these elements of the product and/or service must focus on customer satisfaction. The goods or services may be the best in the marketplace, but it is the entire product that contributes to total customer satisfaction. If the product does not provide total customer satisfaction, the customer will not be satisfied and most likely will go elsewhere to find a product that gives total customer satisfaction.

When striving for total customer satisfaction, the product and/or service, at a minimum, must be comparable to the product offered by the competition. Obviously, a competitive advantage is gained by improving the product. Raising the level of customer satisfaction may differentiate the product or service. A thorough analysis should always accompany any targeting of a product for customer satisfaction.

The goal is always to optimize customer satisfaction with resources. Raising the level too far beyond the current range of customer satisfaction is risky because of two factors. First, the cost factor could impact perceived value. Secondly, the customer may not be ready for the enhanced product or service. In both cases, the product or service may not be sold because it did not satisfy the customer.

Know the Competition

Beat the competition by taking time for intelligence gathering.

The organization must know the competition to establish targets for its products and services and internal improvement efforts. The organization must establish products and services targets in relation to its competition. Typically organizations compete in the major areas of technology, cost, product quality, service quality, and time. Frequently, product competition progresses from one area to the next area. It starts with technology, then cost, then product quality, then quality service, and then time or some other area.

For instance, when the television was first marketed, technology was the foremost satisfier of the customer. Once the technology was readily available and television became more desirous to customers, price became the most important

element. As the television became commonplace, customer satisfaction was judged through product quality; and quality service is the differentiator. Today, television competes on all levels at the same time.

The organization must know in which major area of competition its product and services are competing. This will show the organization where to target its product and services. In addition, the organization should always attempt to achieve the competitive advantage. Therefore, it is important to look for ways to differentiate within the major areas of competition.

The organization must know where it is in relation to the competition to establish internal improvement efforts targets. To determine its position in the competitive market, the organization should benchmark itself against its top competitor and the best in the field. Once benchmarks are determined, the organization can establish internal targets for improvement efforts.

Compile a State of the Organization Report

Situational awareness provides the knowledge to act.

The state of the organization report provides an understanding of where you are today. It gives baseline information for the remaining processes. In other VICTORY action processes, this information is used, updated, clarified, and modified as appropriate. The organization must consider all information to determine the “today state.” As a minimum, the state of the organization report should include:

- VICTORY Report Card
- Customer(s) views of needs and expectations of the organization and deliverables
- Organization’s view of competencies

- Critical Process Performance Indicators
 - Deliverables value to customer
 - Competition Assessment
 - Financial Reports
 - Environment Assessment
- Other items to consider for state of the organization report are:

- Organizational strengths and weaknesses
- Organization threats and opportunities
- Market analysis
- Competition strengths and weaknesses
- Economy impact and forecast
- Technology assessment
- Current strategies, threats, and opportunities
- Problems and issues
- Other information as necessary

Plan - Learn Where You Want to Go in the Future

Define your dream.

Learning where you want to go in the future involves creating a common purpose. The common focus of vision, mission and values as described earlier in this chapter are all part of the strategic planning process. In addition, the organization must focus on specific strategies. If accomplished properly, the mission statement will provide the strategic focus. Specific strategies start with the mission statement. They answer the question: "How can we achieve our mission/focus statement?"

In the following mission statement, the candidates for the strategic focus are in bold print.

Mission Statement

Be a **leading international organization supplying just in time quality products**, committed to providing **total customer satisfaction** through service and value, while maintaining a **positive work environment** and **achieving superior return on investment**.

List opportunities for strategic focus.

Strategic Focus from Mission Statement

- Total customer satisfaction
- Just-in-Time Supplier
- Leading organization
- Quality products
- Positive work environment
- Superior return on investment

If the mission statement does not provide a strategic focus, the organization needs to define their strategic focus. In many organizations, a new or additional strategic focus results from changes in the marketplace, organization, or economy. In these cases, the organization needs to develop a focus statement, just like a mission statement, as the starting point for determining the strategic focus. As a minimum, the organization needs to have a strategic focus in following areas: business, marketing, products, financial, and organization.

Plan - Analyze How to Get from Today to Future State

Let no stone go unturned.

Once the organization has established a strategic focus, the organization must analyze how to bridge the gap from today to the desired future state. This involves combining all the information from the current state with the common view of the future into one focus.

With one focus, the organization continues on the cycle to determine improvement opportunities. The improvement opportunities are formulated into strategic objectives with metrics, strategy, strategic ladders, tactics and goals as show in figure 4.

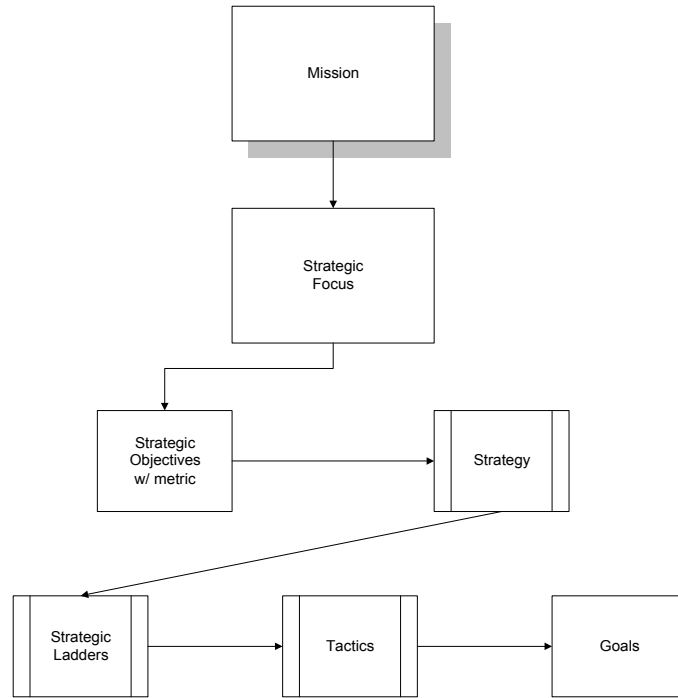


Figure 4 Strategic planning flow.

Strategic Objectives with Metrics

The organization's strategic objectives are the goals the organization must achieve to accomplish the mission or strategic focus. Strategic objectives provide the baseline for determining where you are now and where you need to go in the future for the strategic focus.

Strategic Objectives with Metrics Action Process

1. State the purpose for strategic objectives. The focus is to determine the organization's strategic objectives.
2. Review the mission statement or develop a focus statement.

Mission Statement

Be a **leading** international **organization** supplying *just in time* **quality products**, committed to providing **total customer satisfaction** through service and value, while maintaining a **positive work environment** and **achieving superior return on investment**.

3. List opportunities for strategic focus.

List of Areas for Strategic Focus from Mission Statement

Total customer satisfaction
Leading organization
Quality products

Positive work environment
Superior return on investment

4. Determine a strategic objective for each strategic focus.
For instance, total customer satisfaction “what does it mean to organization?”

Examples:

Strategic Focus: Total Customer Satisfaction

Strategic Objective: Customers are totally satisfied with the entire transaction.

Strategic Focus: Just-In-Time Supplier

Strategic Objective:

Delivery: Make every delivery “just-in-time” for each customer.

Inventory: Inventory available to meet 100% of critical customer demands and meeting all other demands 95% of the time with items from stock with the remaining 5%

Strategic Focus: High Quality Product

Strategic Objective:

External: 100% of deliverables meet or exceed customers’ expectations.

Internal: Products are 100% defect and error free.

5. Document metrics to measure each strategic objective.

Strategic objective metric example

Strategic Focus: Total Customer Satisfaction

Strategic Objective: Customers are totally satisfied with the entire transaction.

Metric: Customer Satisfaction Index

Operational Definition:

On a monthly basis, the strategic council will review the “Customer Satisfaction Report.”

The Marketing Manager will compile the “Customer Satisfaction Report.”

Measurement Method:

The measurement consists of a “Customer Satisfaction Index” compiled as a result of an approved customer satisfaction critique. The customer satisfaction critique indicates the customer’s satisfaction with:

- Deliverable - supplying what you and the customer agreed upon
- Relationship
- Execution - schedule, cost, technical performance

Desired Outcome: Key customers are totally satisfied with the entire transaction.

Linkage to Organizational Objective:
Strategic Objective

Measurement Owner: Marketing Manager

Owner: Executive Council

Business Strategies

How does the organization achieve strategic objectives?

For each of the strategic objectives, the organization needs to develop business strategies. Business strategy focuses on getting an advantage over the competition or other forces. The business advantage can be size, cost, resources, time, flexibility, products and/or services, technology, market, capability, capacity, logistics, distribution, sales, marketing, and so on. Business strategy should consider the following:

- Customer
- Organization
- Competition
- Product

As shown below, as part of the strategic focus of total customer satisfaction, the strategic objective with metric revealed that availability, responsiveness and on-time delivery were critical elements. It was determined that developing the best logistics would be a competitive advantage. Therefore, the strategy is “using the best logistics system as a competitive advantage.”

Strategic Focus: Total Customer Satisfaction

Strategic Objective	Attributes	Strategy
Customers are totally satisfied with entire	Product Availability	Best logistics system

transaction.		
	On Time Delivery	Best logistics system
	Responsiveness	Best logistics system
		Improve information system
		Decrease customer care cycle time
	Product Quality	Continuous process improvement
	Easy to do business with	Customer-driven organization
	Price	Provide value

Strategies Considerations

Strong leadership everywhere in the organization

Teams as the organizational structure of choice

Reengineer processes

Automation and technology

Train and educate continuously

Eliminate variation, defects, and errors

Goals focus on vital areas

Innovate better than the competition

Empower everyone to perform and improve the process

Satisfying customers becomes the primary purpose of the organization

Strategic Ladders

Strategic Ladders are the foundation of tactical plans for the organization. Strategic Ladders specify the specific tactics with outcomes to achieve the strategies. Tactics are the means to accomplish the strategy. The five-year plan is established for each strategy. The five-year plan promotes continuous progress. An example of rungs on the ladder of a five-year plan follows:

Year 1	Baseline
Year 2	Improving
Year 3	Competitive
Year 4	Leader in Industry
Year 5	World Class

Create Five Year Strategic Ladders

Create the ladder for the “best logistics system” in five years. Just like in strategic planning, the organization needs to define the destination and then work backwards to the baseline of the current state. Therefore in our example, the organization determines “it wants to have the best logistics system within five years.” This means synthesis of the total supply chain at optimum cost. This is the ultimate goal for five-year plan. Figure 5 shows the ladder for the best logistics system as determined by the organization.

LADDER FOR BEST LOGISTICS SYSTEM

YEAR 5	WORLD CLASS	Synthesis of total supply chain
YEAR 4	LEADER	Synthesis of logistics system
YEAR 3	COMPETITIVE	Integrate logistics system
YEAR 2	IMPROVEMENT	Improve logistics system
YEAR 1	BASELINE	Current logistics system

Figure 5 Strategic ladder template example.

For each of the years above, tactics are detailed to meet the ultimate goal. For years 1 the current baseline measures must be established. For year 2, specific goals need to be defined. For years 3 – 5, goals are not necessary. Every year the ladder is updated and new tactics and goals are determined. In some organizations, each department or process completes a ladder to achieve their focus.

Determine Categories for each Year in Strategic Ladders

Once the ultimate goal is determined, the owner of the ladder must determine the categories for each rung in the ladder. The categories in figure 6 are typical for a business organization. The ladders can be any category as defined by the organization. For example, other categories could be: inventory, transportation, information technology,

configuration, financial status, shareholders concerns, people development and so on. It is important that the categories be consistent within each strategic ladder. However, an organization with many ladders can have different categories within the different ladders. For instance, the ladders could be: configuration, inventory, transportation, information technology and business results.

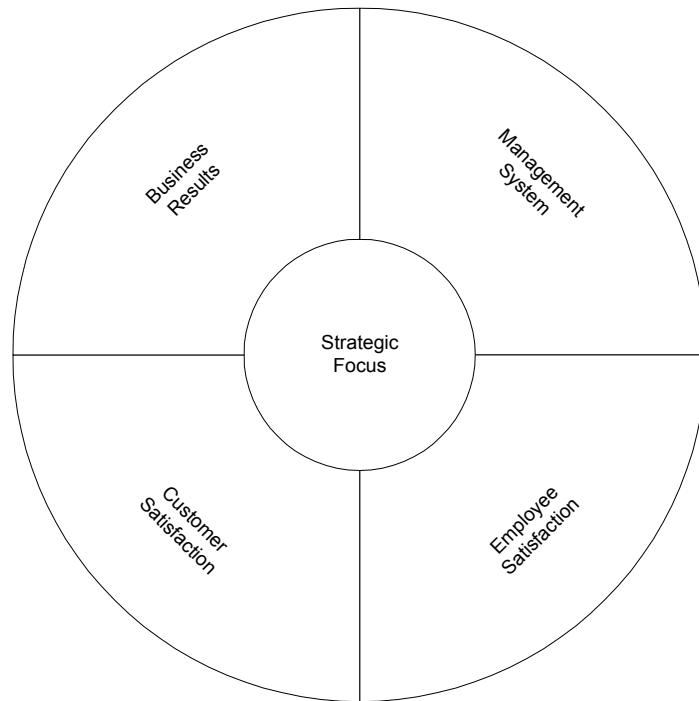


Figure 6 Categories for strategic ladders.

Strategic Ladders Action Process

1. Determine specific strategy for the ladder.
2. Determine the ultimate goal for the ladder.
3. Complete other rungs of the ladder with description.
4. Determine categories for tactics.
5. Identify realistic five-year tactics.
6. Assess current capabilities.
7. Determine year 2 goals for each tactic.
8. Document the strategic ladders with tactics and goals.
9. Perform continuous review and one year update.

Tactics

Tactics are the means to accomplish the strategy. The potential for tactics is limitless. However, the following are a few examples of tactics that your organization could employ.

- MANAGING FOR VICTORY System
- Visioning with customer focus
- Involving everyone in a team-based organization
- Continuous improvement toward excellence
- Develop a learning culture
- Owning work processes fosters empowerment
- Recognizing and rewarding builds high performance
- Yearning for VICTORY ensures success
- Customers driving VICTORY
- Progressive leadership
- Design in quality
- Concurrent engineering
- Robust design
- Lean Production

- Create organizational culture (organizational development)
- Computer-Aided Design, Engineering, and Manufacturing
- ISO-9000
- Kaizen (continuous improvement)
- Statistical Process Control
- Information systems
- Manufacturing Planning and Control Systems
- Computer Integrated Manufacturing
- Total Production Maintenance
- Mistake Proofing
- Technology application
- Customer Relationship Management
- Trained people
- Relationship building
- Supplier partnerships
- Capital investment
- Few organizational layers
- Flexible organizational structure
- Projects
- Reengineering
- Creativity and innovation
- New performance reward systems
- Systematic team problem-solving
- Optimize inventory
- Optimize transactions
- Improve work flows
- _____
- _____
- _____
- _____
- _____

Strategic Ladder Example

The following is an example of a strategic ladder for two years.

LOGISTICS PLAN

Strategic Focus: Total Customer Satisfaction

Strategic Objective: Customers are totally satisfied with the entire transaction.

Strategy: To have the best logistics system in the industry.

Focus Statement: Use logistics as a competitive advantage by ensuring:

- ❑ Availability of product
- ❑ On-time delivery
- ❑ Optimum cost

Ultimate Five-Year Goal: Synthesis of total supply chain while optimizing total logistics costs.

YEAR Baseline

Logistics Ladder for Availability

Business Results	Inventory is available 80% of the time within 24 hours.
Management System	Management system is informal. Organization is structured by function. Planning and information is mostly centralized.

	Forecasting and demand management is centralized. Information system provides little decision making support.
Customer Satisfaction	Meeting customer requests through large inventory.
Employee Satisfaction	Employees just do the job.

YEAR Improvement

Logistics Ladder for Availability

Business Results	Improve inventory availability.
Management System	Management system is formal. Organization is structured by process. Planning and information is centralized and decentralized. Forecasting and demand management is centralized and decentralized. Information system real time decision-making support.
Customer Satisfaction	Meeting customer requests with integrated inventory.
Employee Satisfaction	Employees care for customers.

For each tactic in year 2 define a specific goal.

Tactic	Goal
Improve inventory availability.	Improve inventory availability from 80% to 90% in 24 hours and remaining percentage to 95% in 72 hours within the next year.

Set Specific Goals

Goals must be set.

The strategic ladders help define tactics to achieve strategic objectives. Just like the strategic objectives need metrics for evaluation. Tactics require specific goals.

A goal is the specific desired outcome(s) of some activity. Goals are important to know exactly where you are going. Goals provide clear direction and focus. Where vision and mission define the long-term view—“where you want to go in the future,” goals establish the short-term look—“each step along the way.”

Goals also tell how you are doing. This is critical to staying on-track and making necessary adjustments. Goals help you monitor progress, evaluate situations, and make improvements.

Every person in the organization and any group/team should have goals. At the organization’s strategic level, goals are the same as strategic goals.

Goals should be specific, measurable, attainable, results-oriented, and time bound. The goal should be clear. Set a reasonable goal but do not set sights too low. The goal should be in the middle range. It should not be unattainable

or too easy. Set a goal that will be a challenge. An easy goal is not a worthwhile endeavor. Orient goals toward specific measurable results. Make sure there is specific feedback on the goal outcome. Ensure goals are linked to organizational objectives or customer requirements. The people closest to the process should set the goals. They are the ones that achieve the goal. The person, group, or team responsible for accomplishment of the goal must accept the goal. The following are setting specific goals considerations:

Gear to specific results—defined within parameters

Observe by measurement—be able to check outcome

Attain success—challenging, but realistic

Limit to specific time—include time boundaries

Set by process owner(s)—let people closest to process set the goal

Writing Effective Goals

Using the guidelines for writing effective goals, some examples are as follows:

- Reduce manufacturing cycle time for assembly from 6 hours to 2 hours within 1 month.
- Decrease errors in quantity required block on order processing sheet from 10 per month to 0 per month in 3 months.
- Decrease errors in quantity required block on order processing sheet from 10 per month to 0 per month in 3 months.
- By the end of the year, the ABC company will respond to all customer complaints with a solution satisfactory to company and customer within 24 hours.

The following goal statement is not an effective goal according to the guidelines:

Improve order-processing time in customer service.

The statement above is more of a mission statement. It should be rewritten as a goal as follows:

- Improve the time to process an order from order receipt from 3 days, to order ready for delivery to 6 hours in 30 days.

How to Set Goals

Before setting goals, it is important to gather critical information affecting the goals. Critical information affecting the goal could be:

- Vision
- Mission
- Strategic objectives
- Goals achieved
- Current performance measures
- Customer needs and expectations
- Competition performance

The action process steps to setting goals are as follows:

1. Understand the mission of the organization, define performance capabilities, and establish organization and customer requirements.
2. Brainstorm expected outcome(s). This can be done as an individual or as a group/team.
3. Clarify ideas. Discuss each item requiring explanation.
4. Agree on items to consider for goals. The individual, group, or team needs to decide which items should be included as goals.

- a. Evaluate each item as a yes, no, or maybe for goal.
 - b. Resolve the maybe list.
 - c. List items for goals.
5. Write an initial effective goal statement along the top of a flipchart for each goal item. This is the initial goal statement for each goal on the list of goal items.
 6. Review each goal statement with additional background information.

What additional information is required to complete the goal statement? Were the right people involved in writing the goal? Is there enough information to establish measures?

7. Evaluate the goal statement(s).

The initial goal statement should be evaluated to ensure it meets the criteria for an effective goal. It should answer the following questions:

 - Is the goal geared to a specific result?
 - Can you observe the attainment of the goal by measurement?
 - Is the goal a challenge while within reach?
 - Is the goal specified to be completed within a certain time period?
 - Is the goal geared to a specific result?
 - Can you observe the attainment of the goal by measurement?
 - Is the goal a challenge while within reach?
 - Is the goal specified to be completed within a certain time period?
 - Was the goal set by the person or people that will make it happen?
8. Clarify the goal statement(s).

Rewrite the goal statement until it is clear, concise, and simple for everyone to understand.

9. Get personal commitment to the goal(s).
Each person responsible for the goal and/or each group/team member must make the necessary agreement to support the goal(s).
10. Monitor the progress.
Establish an Action Plan to regularly review and take action on the goal(s).

Plan - Navigate to Get to the Future State

Take action to achieve your dream.

The final step in strategic planning is the most important. There are many organizations that plan, plan, and plan. There are organizations that act, act, and act. The winning organization plans and acts on the plan.

Everyone is part of the action planning process. Action planning is dynamic. With action planning, top leadership still determines the focus but the entire organization makes it happen. The strategy, objectives, goals, tactics, and operations are integrated into the organization's way of life. Each phase of planning determines specific actions. These specific actions are continually measured, reviewed, and updated by all employees in the organization. This involves constant attention by leadership and all employees to ensure the actions are focused and the organization is performing as desired. Action planning becomes part of the everyday method of doing business.

The continuous improvement cycle is used for action planning. During the action planning cycle, Phase 1 involves clarifying the focus. In Phase 2, the yearning for discovery of specific improvement opportunities becomes the task. During Phase 3, improvement opportunities are chosen. In Phase 4,

continuous improvement is launched. During Phase 5, results are evaluated. This cycle must be completed over and over again in a never-ending cycle.

The action planning process integrates with the strategic planning process. The focus for action planning comes from the common focus of the organization. From these actions, the action process provides the execution of the strategic plan.

Action Items

The action items are the specific actions that need to be accomplished to achieve goals. These action items are actions that are to be accomplished within 90 days to achieve this year's strategic ladder or any other improvement action. Action items are updated as necessary. They should be reviewed and updated by management at least every 30 days. An example of the action item list is shown in figure 7.

Focus – Seek Action

Visioning without action is a waste of time.

The strategic planning process is only valuable when the plan produces results. Many organizations either plan without action or they take action without proper planning. Both of these approaches can be bad for an organization. A MANAGING FOR VICTORY organization sees the value in proper planning and they provide the organizational culture, support, and systems to ensure actions focusing on the vision, mission and strategic objectives are the norm.

ACTION ITEM RECORD

Item #	Action Item	Start Date	Date Completed	Owner

Figure 7 Action item record.

ACTION PROCESS - CREATING A FOCUS FOR YOUR ORGANIZATION

This section describes the actions necessary to create a focus for your organization. This process can be self-directed. However, this is the one area where professional assistance is recommended. A professional can facilitate the process. They also can make the difference in focusing on “real” issues. They can force the answers to the hard questions without fear of internal politics. They help can break the barriers to progress and change found in some organizations. If you do it alone or use professional assistance, the process of creating a common focus must lead to action.

The action process that follows will guide you through the process of visioning with a customer focus.

1. **I**magine your view of your organization’s victory. Write a strategic focus statement. What does strategic focus mean to your organization?”

2. **N**ame a strategic objective for your strategic focus. Select one strategic focus from the focus statement.

3. **T**arget a metric to evaluate your strategic objective. How will you know when you achieve your strategic objective?

4. **E**xamine the problems, issues and opportunities to achieve the strategic objective. What are the possibilities that may prevent or help achieve the strategic objective?

6. **N**ame the tactics necessary to achieve the strategic objective. How will you achieve the strategic objective?

7. **T**arget one tactic to achieve the strategic objective?
How can you most impact strategic objective?

8. **I**dentify a specific goal to achieve the tactic.

9. **O**utline actions to achieve the goal.

10. **N**avigate the action plan until achieve goal.

***VISION,
MISSION,
VALUES,
AND GOAL
SETTING
ACTION
PROCESS
WORKSHEETS***

Creating a Vision

A vision is the organizations' view of the future. It provides the focus for the journey of the organization to reach. The vision is manifested in a statement of the ultimate "image" of the organization. It should reflect the continuous quest for excellence within the organization and constant pursuit to fulfill customer expectations.

The vision is created by the top-leadership in an organization. Although top-leadership usually creates the vision, it must be instituted throughout the organization. For this to occur, it must have meaning and be shared by everyone in the organization. It must be more than a slogan. It must foster some definite course of action that must be displayed by the organization's leadership. To have relevance to where the organization wants to go, the vision must be oriented toward the customer. The vision must communicate both inside and outside the organization a long-term picture for the organization. This vision must be constantly communicated to build the loyalty and trust necessary to develop a work force committed to its achievement.

Vision Considerations

- ☞ **V**iew of the future
- ☞ **I**nstitute the vision within the organization
- ☞ **S**et the example through leadership
- ☞ **I**nclude where organization wants to go in the future
- ☞ **O**rient toward customers
- ☞ **N**urture through constant communication

When To Create a Vision

A vision should be created for a new organization. This could be a company, division, department, project group or even some teams. A shared vision is important when an organization is just starting to provide a sense of purpose for the long-term.

A vision is also helpful in an established organization. It gives a common focus to organizations without a stated future image or it redirects organizations seeking to adapt to changing environments.

A vision should be created when an organization is in a rut or complacent. A vision provides the opportunity for an organization to look to future successes. This sometimes give the organization the impetus to go beyond their current situation with some hope and enthusiasm for improvement.

Therefore, a vision statement should be considered when:

- ✎ Forming a new organization
- ✎ Starting a project
- ✎ Needing to get a clear focus on the future
- ✎ Focusing on new priorities for the future
- ✎ Adapting to changing environments
- ✎ Installing a new leader

A vision is normally not appropriate when:

- ✎ Forming an organization with a short life span
- ✎ Creating a committee
- ✎ Working on a problem-solving or process improvement team

How to Create a Vision

The action process steps for creating a vision are as follows:

1. **Visualize the future.** The top-leadership in the organization imagine their ideal view of the future organization. This future should be defined in years. Depending on the dynamics of the organization, this can be anywhere from 5 years to a unlimited time in the future. This view of the future is normally done by the top person in the organization.

2. **Write the vision statement along the top of a flipchart.**

3. **Review the vision with additional background information.** Although the top person in the organization normally provides the initial vision, it should be further defined by the top-leadership in the organization. This includes the top person, direct reports, and others as deemed appropriate by the organization (representatives of union, middle managers, suppliers, customers).

4. **Evaluate the vision.** The initial vision should be evaluated to ensure it meets the organizational criteria of the future. It should answer the following questions:

- Is it an attainable view of the future?
- Does it clearly state to all of the people in the organization a common purpose for the organization?
- Does it convey where the organization really wants to go?
- Does it provide an understanding of what to do?
- Is it oriented toward organizational excellence and specific customer expectations?

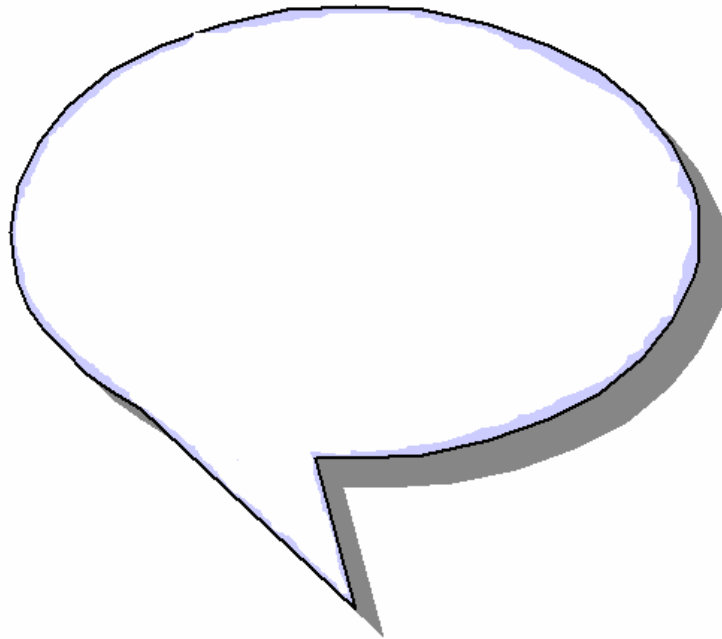
5. **Clarify the vision statement.** Rewrite the vision statement until it is clear, concise, and simple for everyone to understand.

6. **Institute the vision in the organization.** This is accomplished through constant communication at every opportunity. In addition, the vision must be set and sustained by the example of everyone in the organization, especially top-leadership.

Creating a Vision Worksheet

1. **Visualize the future.** The top person in the organization imagines the future. Usually, the top person just closes his or her eyes and states whatever comes to mind.

Top Leader's Vision



2. **Write the vision statement along the top of a flipchart.**

The draft vision statement is written on a flipchart. The draft vision is a statement from the top person's visualization.

Initial Vision Statement

3. Review the vision with additional background information.

What additional background information does the team need to make the final vision statement? The team members contribute additional information.

List the essential information needed to complete the vision.

4. **Evaluate the vision.** The initial vision should be evaluated to ensure it meets the organizational criteria of the future. It should answer the following questions:

- Is the vision an attainable view of the future?

- Does it clearly state to all of the people in the organization a common purpose for the organization?

- Does it convey where the organization really wants to go?

- Does it provide an understanding of what to do?

- Is it oriented toward organizational excellence and specific customer expectations?

5. **Clarify the vision statement.** Rewrite the vision statement until it is clear, concise, and simple for everyone to understand.

Vision Statement

Developing a Mission Statement

The mission describes the basic purpose and expected results of the organization. It sets the common purpose of the organization. For a corporation, the mission describes the corporate view of the role and function of the organization in satisfying customers' expectations today and in the future. For a public agency, mission derives from constitutional or legislative mandates and executive requirements. Mission statements further detail how the organization is going to fulfill its public mandate. For a business concern or public enterprise, the mission is a function of the view of what lies at the core of the organization. Mission is "what we are in business for." For a team, the mission is the intended result of the team's efforts.

Mission Considerations

- ☞ **M**ust be customer driven
- ☞ **I**ncludes the purpose for the organization
- ☞ **S**ets the common direction
- ☞ **S**ets the expected results
- ☞ **I**nvolves all stakeholders
- ☞ **O**pens and maintains communications
- ☞ **N**eeds long-term orientation

When To Develop a Mission Statement

A mission should be created for a new organization. This could be a company, division, department, function, project group or team. A mission is essential when an organization is just starting to provide a common purpose with clear expectations.

A mission is also helpful in an established organization. It gives a common purpose to organizations or it redirects organizations seeking to adapt to changing environments.

A mission should be created or revised when an organization requires improvement. A mission clarifies the intended results. It provides an opportunity for an organization to look to specific outcomes. This gives the organization the impetus to move forward.

Therefore, a mission statement should be considered when:

- ✎ Forming a new organization
- ✎ Starting a project
- ✎ Needing to get a clear focus on the specific results
- ✎ Focusing on new priorities
- ✎ Adapting to changing environments
- ✎ Installing a new leader
- ✎ Forming an organization with a short life span
- ✎ Creating a committee
- ✎ Working on a problem-solving or process improvement team

Any group of people working together to achieve some result should have a mission statement.

How to Develop a Mission Statement

The action process steps to developing a mission are as follows:

1. **Understand the organization, competition, processes, customers.** The mission is based on the knowledge of the organization. Typically, the people developing the mission should have a grasp of the critical strategic factors impacting the organization.
2. **Brainstorm purposes and intended results of the organization.** First, each team member takes five minutes to write items for purposes and intended results of the organization on two separate pieces of paper. Second, the team conducts a round robin brainstorming session to list items on the flipchart, first for the purposes, and then for the intended results. This involves each team member in-turn providing one item from their sheet of paper. This is continued until all items from the individual sheets of paper are listed on the flipchart. Third, the list is added to by a freewheeling brainstorming session. This opens the list to everyone to add more items.

BRAINSTORMING RULES

- R**ecord all ideas
- U**se creative, innovative thinking
- L**imit judgment until discussion
- E**ncourage participation by everyone
- S**olicit quantity

3. **Clarify ideas.** Discuss each item requiring explanation.

4. Agree on non-negotiable, essential and desirable items.

The team needs to decide which purposes should be included in the mission statement.

- a. Get agreement on non-negotiable items.
- b. Evaluate each item as a yes, no, or maybe for essentials.
- c. Evaluate each item as a yes, no, or maybe for desirable.
- d. Resolve essential and desirable list.

5. Write the initial mission statement along the top of a flipchart. An initial mission statement is composed from the non-negotiable and essential items.

6. Review the initial mission with additional background information. What additional information is required to complete the mission statement? The team needs to ensure the initial mission statement includes all critical elements to the organization. Also, the list of intended results should be check to ensure it includes measures of customer satisfaction and organizational performance.

7. Evaluate the mission. The initial mission should be evaluated to ensure it meets the organizational criteria of the future. It should answer the following questions:

- What are the customer needs or expectations driving the mission?
- Does the mission clearly state the purpose of the organization?
- What is the common direction stated in the mission?
- What are the expected results?
- Does the mission include purpose for everyone?
- Was the mission reached by consensus?
- Is the mission oriented toward long-term viewpoint?

8. **Clarify the mission statement.** Rewrite the mission statement until it is clear, concise, and simple for everyone to understand.
9. **Get each team member's personal commitment to the mission statement.** Ask each team member individually do they agree with the mission statement and can they support it.
10. **Institute the mission in the organization.** This is accomplished through action planning, follow-up and constant communication.

Developing a Mission Worksheet

1. Understand the organization, competition, processes, and customers.

List the essential strategic information needed to start developing a mission.

2. Brainstorm purposes and intended results of the organization.

Purposes of the Organization

Intended Results

3. **Clarify ideas.** Discuss each item requiring explanation.

4. **Agree on non-negotiable, essential, and desirable items.**

Non-negotiable

Essentials

Desirable

5. **Write the initial mission statement along the top of a flipchart.** An initial mission statement is composed from the non-negotiable and essential items. Note: It is recommended that a draft initial mission statement be composed by a specific person, or persons, or sub-committee.

Initial Mission Statement

6. **Review the initial mission with additional background information.**

What additional background information does the team need to make a final mission statement? The team members contribute additional information.

List the essential information needed to complete the mission.

7. **Evaluate the mission.** The initial mission should be evaluated to ensure it meets the organizational criteria of the future. It should answer the following questions:

What are the customer needs or expectations driving the mission? ✎ Explain

Does the mission clearly state the purpose of the organization? ✎ Explain

What is the common direction stated in the mission?
✎ Explain

What are the expected results? ~~☒~~ Explain

Does the mission include purpose for everyone?

~~☒~~ Explain

Was the mission reached by consensus? ~~☒~~ Explain

Is the mission oriented toward long-term viewpoint?

~~☒~~ Explain:

8. **Clarify the mission statement.** Rewrite the mission statement until it is clear, concise, and simple for everyone to understand.

Mission Statement

9. **Get each team member's personal commitment to the mission statement.** Ask each team member individually do they agree with the mission statement and can they support it.

Name

Agree

Determining the Organizational Values

Values are important to guide the conduct of the organization. Values include the principles the organization believes and follows. Values derive from the ethics of the organization. Values are the collective concept of what is important and what is "right" about the organization. Typically, values bring to the surface issues of honesty, trust, and integrity. They describe ways of communicating within the organization. They guide relationships with the competition, suppliers, and customers. Values generally establish ground rules for producing on the promise of the organization. Values have to do with the rights and privileges of management and employees and set the tone for policy and procedure. For instance, if the organization values an internal communication system that designs and develops projects through "concurrent and parallel work," it states this value in its core value document.

Values Considerations

- ☞ **V**iews of what is right in the organization
- ☞ **A**ppears in peoples organizational behaviors
- ☞ **L**eads to organizational culture
- ☞ **U**ses organizational ethics, honesty, integrity and trust
- ☞ **E**ncourages relationships within the organization and with suppliers, competition, community, and customers
- ☞ **S**upports the quest for quality

How to Determine Organizational Values

The action process steps for determining organizational values are as follows:

1. **Identify basic values through brainstorming.** First, each team member takes ten minutes to write their basic values. Second, the team conducts a round robin brainstorming session to list items on the flipchart. This involves each team member in-turn providing one item from their sheet of paper. This is continued until all items from the individual sheets of paper are listed on the flipchart. Third, the list is added to by a freewheeling brainstorming session. This opens the list to everyone to add more items.

Note

Use the rules for brainstorming.

BRAINSTORMING RULES

Record all ideas

Use creative, innovative thinking

Limit judgment until discussion

Encourage participation by everyone

Solicit quantity

2. **Clarify ideas.** Discuss each item requiring explanation.
3. **Agree on non-negotiable, essential and desirable items.**

The team needs to decide which values are candidates for the values statement.

- a. Get agreement on non-negotiable items.
- b. Evaluate each item as a yes, no, or maybe for essentials.
- c. Evaluate each item as a yes, no, or maybe for desirable.
- d. Resolve essential and desirable list.

4. **Write each value into a values statement.** An initial values statement is composed from the list of values.

5. **Review each values statement with additional background information.** What additional information is required to complete the values statement? The team needs to ensure the initial values statement includes all critical elements to the organization.

6. **Evaluate the values statement.** The initial values statement should be evaluated to ensure it meets the organizational criteria. It should answer the following questions:

- Does it include all the principles the organization believes and follows?
- Does the values statement clearly bring to the surface issues of honesty, trust, ethics, and integrity?
- Does the values statement foster relationships within the organization and with suppliers, competition, community, and customers?
- Does the values statement indicate appropriate organizational behaviors?
- Does the values statement support the quest for quality?

7. **Clarify the values statement.** Use focus groups or other means to ensure the values statements are shared throughout the organization. Rewrite the values statement until it represents the consensus of the organization.

8. **Get each stakeholders personal commitment to the values statement.** Ask each team member individually do they agree with the values statement. This could include everyone in the organization.

9. **Institute the values in the organization.** This is accomplished through constant communication at every opportunity and positive reinforcement of behaviors reflecting the values statement.

Determining Organizational Values Worksheet

1. Identify basic values through brainstorming.

Basic Values of the Organization

2. Clarify ideas.

3. Agree on non-negotiable, essential and desirable items.

Non-negotiable

Essentials

Desirables

4. Write each value into a values statement.

Initial Values Statement

5. Review each value statement with additional background information. What additional information is required to complete the values statement? The team needs to ensure the initial values statement includes all critical elements to the organization.

List the essential information needed to complete the values statement.

6. Evaluate the values statement. The initial values statement should be evaluated to ensure it meets the organizational criteria. It should answer the following questions:

- Does it include all the principles the organization believes and follows?

- Does the values statement clearly bring to the surface issues of honesty, trust, ethics, and integrity?

- Does the values statement foster relationships within the organization and with suppliers, competition, community, and customers?

- Does the values statement indicate appropriate organizational behaviors?

- Does the values statement support the quest for quality?

7. Clarify the values statement.

Values Statement

8. Get each stakeholders personal commitment to the values statement. Ask each team member individually do they agree with the values statement. This could include everyone in the organization.

Name

Agree

Setting Goals

A goal is the specific desired outcome(s) of some activity. Goals are important to know exactly where you are going. Goals provide clear direction and focus. Where vision and mission define the long-term view—“where you want to go in the future,” goals establish the short-term look—“each step along the way.”

Goals also tell how you are doing. This is critical to staying on-track and making necessary adjustments. Goals help you monitor progress, evaluate situations, and make improvements.

Every person in the organization and any group/team should have goals.

Goals should be specific, measurable, attainable, results-oriented, and time bound. The goal should be clear. Set a reasonable goal but do not set sights too low. The goal should be in the middle range. It should not be unattainable or too easy. Set a goal that will be a challenge. An easy goal is not a worthwhile endeavor. Orient goals toward specific measurable results. Make sure there is specific feedback on the goal outcome. Ensure goals are linked to organizational objectives or customer requirements. Goals should be set by the people closest to the process. They are the ones that achieve the goal. The goal must be accepted by the person or group/team responsible for accomplishment of the goal.

Goals Considerations

- ☞ **G**ear to specific results—defined within parameters
- ☞ **O**bserve by measurement—be able to check outcome
- ☞ **A**ttain success—challenging, but realistic
- ☞ **L**imit to specific time—include time boundaries
- ☞ **S**et by process owner(s)—let people closest to process set

Goal Setting Principles

Provide specific targets; state exact outcome(s) or behaviors

Recognize and reward results

Involve the stakeholder or stakeholders in goal setting

Nurture individual differences for achievement, autonomy, and affiliation

Commit to the goal

Integrate goal setting into day-to-day operations

Pursue challenging goals

Limit the number of goals to a manageable amount

Encourage feedback on goals

Systematize goal setting

When To Set Goals


Goals should be set once you understand the complete process, know performance capabilities, and establish customer and organization requirements. In addition to the above, for a group/team, goal setting should be accomplished after the vision, mission, and values statements.

Therefore, setting goals should be considered when:

- ✎ striving for continuous improvement
 - ✎ achieving prior goal has been met
 - ✎ working a project
 - ✎ needing to revitalizing an individual, group, or team
 - ✎ raising the standard
 - ✎ trying to establish a purpose
 - ✎ fostering accountability and ownership
 - ✎ making a change in work performance
 - ✎ establishing performance expectations
 - ✎ defining milestones
 - ✎ entering a new performance period
 - ✎ Other
-
-
-

What Are Your Goals?

 **Instructions**

 In the space below, write five goals for the next year.

1. _____

2. _____

3. _____

4. _____

5. _____

Writing Effective Goals

Using the guidelines for effective goals, the following are examples of effective goals.

Examples of effective goals

Reduce manufacturing cycle time for assembly A from 6 hours to 2 hours within 1 month.

Decrease errors in quantity required block on order processing sheet from 10 per month to 0 per month in 3 months.

By the end of the year, the ABC company will respond to all customer complaints with a solution satisfactory to company and customer within 24 hours.



Instructions

✎ Rewrite the following incomplete goals into effective goals using the goal guidelines.

Improve order processing time in customer service.

Reduce cost of quality in manufacturing.

How to Set Goals

The action process steps to setting goals are as follows:

1. Understand the mission of the organization, define performance capabilities, establish organization and customer requirements.

Before setting goals, it is important to gather critical information affecting the goals. Critical information affecting the goal could be:

- Vision
- Mission
- Strategic objectives
- Goals achieved
- Current performance measures
- Customer needs and expectations
- Competition performance

2. Brainstorm expected outcome(s).

This can be done as an individual or as a group/team.

3. Clarify ideas. Discuss each item requiring explanation.

4. Agree on items to consider for goals.

The individual, group, or team needs to decide which items should be included as goals.

- a. Evaluate each item as a yes, no, or maybe for goal.
- b. Resolve the maybe list.
- c. List items for goals.

5. Write an initial effective goal statement along the top of a flipchart for each goal item.

This is the initial goal statement for each goal on the list of goal items.

6. Review each goal statement with additional background information.

What additional information is required to complete the goal statement? Were the right people involved in writing the goal? Is there enough information to establish measures?

7. Evaluate the goal statement(s).

The initial goal statement should be evaluated to ensure it meets the criteria for an effective goal. It should answer the following questions:

- Is the goal geared to a specific result?
- Can you observe the attainment of the goal by measurement?
- Is the goal a challenge while within reach?
- Is the goal specified to be completed within a certain time period?
- Was the goal set by the person or people that will make it happen?

8. Clarify the goal statement(s).

Rewrite the goal statements until it is clear, concise, and simple for everyone to understand.

9. Get personal commitment to the goal(s).

Each person responsible for the goal and/or each group/team member must make the necessary agreement to support the goal(s).

10. Monitor the progress.

Establish an Action Plan to regularly review and take action on the goal(s).

Setting Goals Worksheet

-
- 1. Understand the mission of the organization, define performance capabilities, establish organization and customer requirements.**

List the essential information needed to start developing a goal.

- 2. Brainstorm expected outcome(s).**

Expected Outcome(s)

3. **Clarify ideas.** Discuss each item requiring explanation.

4. **Agree on items to consider for goals.**

5. **Write an initial effective goal statement along the top of a flipchart for each goal item.**

This is the initial goal statement for each goal on the list of goal items.

Initial Goal Statement

1. _____

2. _____

3. _____

4. _____

5. _____

6. Review each goal statement with additional background information.

What additional information is required to complete the goal statement? Were the right people involved in writing the goal? Is there enough information to establish measures?

List the additional information needed to complete the goal(s).

7. Evaluate the goal statement(s).

The initial goal statement should be evaluated to ensure it meets the criteria for an effective goal. It should answer the following questions:

- Is the goal geared to a specific result?
- Can you observe the attainment of the goal by measurement?
- Is the goal a challenge while within reach?
- Is the goal specified to be completed within a certain time period?
- Was the goal set by the person or people that will make it happen?

8. Clarify the goal statement(s).

Rewrite the goal statement until it is clear, concise, and simple for everyone to understand.

Goal Statement

1. _____
2. _____
3. _____
4. _____
5. _____

9. Get personal commitment to the goal(s).

Each person responsible for the goal and/or each group/team member must make the necessary agreement to support the goal(s).

10. Monitor the progress.

Establish an Action Plan to regularly review and take action on the goal(s).

**CREATING A
COMMON
FOCUS
ASCROSTICS**

Creating a common focus considerations

Focus on the future with a vision

Orient everyone toward a common mission

Communicate principles with a value statement

Use a strategic planning process

Seek action

Vision considerations include:

View of the future

Institute the vision within the organization

Set the example through leadership

Include where the organization wants to go in the future

Orient toward customers

Nurture through constant communication

Mission considerations include:

Must be customer driven

Includes the purpose of the organization

Sets the common direction

Sets the expected results

Involves all stakeholders

Opens and maintains communications

Needs long-term orientation

Values considerations include:

Views of what is right in the organization

Appears in peoples' organizational behaviors

Leads to organizational culture

Uses organizational ethics, honesty, integrity and trust

Encourages constructive relationships

Supports the quest for excellence

Strategic plan considerations include:

Provide understanding of where you are today

Learn where you want to go in the future

Analyze how to get from today to the future

Navigate to get to the future state

The organizational culture affects:

Communications, internal and external

Unity for cooperation and teamwork

Leadership and followship styles

Time and urgency factors

Uniqueness in the marketplace

Relationships

Effectiveness, efficiency, productivity, and quality

Strategies considerations

Strong leadership everywhere in the organization

Teams as the organizational structure of choice

Reengineer processes

Automation and technology

Train and educate continuously

Eliminate variation, defects, and errors

Goals focus on vital areas

Innovate better than the competition

Empower everyone to perform and improve the process

Satisfying customers becomes the primary purpose of the
organization

Setting specific goals considerations:

Gear to specific results—defined within parameters

Observe by measurement—be able to check outcome

Attain success—challenging, but realistic

Limit to specific time—include time boundaries

Set by process owner(s)—let people closest to process set the
goal

