MANAGER’S KIT

Goal Engagement & Great Execution
Leadership opportunity

People with clear, written goals accomplish far more in a shorter period of time than people without them could ever imagine.

– Brian Tracy

1. Source: Metrus Group survey
2. Source: Gallup survey
Gaps Between People, Goals & Work

- 76% of people use To Do lists.
- 7% understand the goal of their organization and what to do to achieve it.
- Only 13% of employees are actively engaged in their work.
The odds of goal achievement are 90% with written goals and clear coaching.
Engage your team in great execution

This kit provides a management model for goal engagement and great execution.

To make the most of the kit:

1. First, view this kit in full-screen mode to get the whole picture.
2. Use the placeholders to deepen your thinking on goals, metrics, motivation and work plans.
3. Extract pages and tailor them to communicate your model to your team at a staff meeting.
4. Expect it to take 4 weeks for new habits to form as you work the model.

If you don’t have or haven’t communicated clear goals, there’s no time like the present to start!
Set and communicate goals

Identify 2-3 strategic goals for the quarter. Use aspirational language to help the team get passionate about achievement.

Ensure each team member understands the purpose of their work and the results you’re trying to achieve. (All the work your team does should align to achieving these goals.)

Sample Goals:

- Deliver better content to our users to increase ad sales opportunities
- Delight customers

“Predicting rain doesn’t count, building arks does.” — Warren Buffett

Your Goals:

1.
2.
3.
4.
5.
Define metrics for success

Define a metric that will be used to assess success and when it should be achieved. Communicate the metrics to the team so they understand how success will be measured and the value of the work. Keep the metrics visible to reduce diversions by less valuable work.

Sample Metrics:

Increase page views to enable higher ad sales

40% Increase in Page Views by Year End

Delight customers

100 Referrals by March 30

“You can spend your life running up and down the field and never score.”
— Bill Copeland

Your Key Metrics:

1.

2.

3.

4.

5.
Plan and delegate work

Organize for execution and accountability. Define the streams of work required and team members involved. Workstreams are a way to group and monitor related effort (or the recurring functional activities of your teams).

Sample Workstreams
- Content Development
- Page & Site Design
- Customer Engagement
- User Experience Design

“Plan with audacity, execute with rigor.”
– Christian Bovee

Your workstreams:
1.
2.
3.
4.
5.
Define and distribute the primary action items in weekly work plans with due dates and owners. Minimize burden and maximize goal achievement by assigning significant actions with precise outcomes and let the team flesh out the details.

Use weekly staff meetings to communicate the week’s plans and hold people accountable for prior week outcomes.

**Sample Action Items**

- Refresh the blog page layout with new style guide by Friday (Mary)
- Publish 2 third-party articles by Thursday (Satya)
- Conduct customer survey by February 20 (Brian)

“The ultimate inspiration is the deadline.”
— Nolan Bushnell

**Your Primary Action Items:**

Identify the top 5-10 deliverables needed in the next two weeks to achieve your goals.
Motivate people

Help your team relate their work to the goals and recognize progress. Foster purpose and passion week after week by staying on the plan yourself.

Provide support and feedback as work progresses – be generous with “attaboys”.

Use 1on1s to reiterate and reinvigorate goals, check progress and remove obstacles.

Ask what motivates people; incorporate it in engagement.

“The road to success is always under construction.”
— Lily Tomlin

Engaging your staff:

Capture what motivates each staff member

Identify what engagement change you'll incorporate to improve execution velocity:
Track status of key deliverables

Ask for weekly status on results and for each primary action and deliverable; use red/green light indicators to better predict and prevent execution issues.

Use your staff meetings to remove roadblocks and plan next week's work rather than recounting last week's status.

Sample Status

- Refresh the blog page layout with new style guide by Friday – DONE (Mary)
- Publish 2 third-party articles by Thursday – DOING late because Acme doesn’t have pub approval (Satya)
- Redesign landing page by Tuesday – NEXT, HI PRIORITY (Maurice)

“Don’t expect what you don’t inspect.”

— Clement Stone

Facts to have before staff meetings:

1.
2.
3.
4.
5.
Measure results

Measure results against the goal and metrics you’ve defined. Determine who should provide the data points on the key metric for each goal; ask them to provide it in their report.

When you get great results, give great feedback; don’t hesitate to provide fact-based, unemotional feedback where improvements are needed.

“What's measured improves.”
— Peter Drucker

Results you report:

What will you communicate upline as progress against the organization’s goals?

What level deliverable?

What type of red flags?

What metrics?
Pivot quickly

Respond to changing competitive, market, resource and organization conditions by redirecting efforts, changing goals, and re-planning work.

When overall goals change, pull the team together to communicate which facts and circumstances changed, the root cause, and changes in plan of action.

“Change is inevitable, progress is not.”
— Max McKeown

Develop a checklist for socializing and executing the pivot:

What facts and decisions are needed upline to get support?

Have you re-set the team and provided logic for the shift so they move seamlessly forward?

What are the new goals and metrics and have you re-set the work plans?
Align on Achievement with Workboard

Bring your team, goals, priorities, work and results together.
How Workboard supports the team...

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<thead>
<tr>
<th>GOALS</th>
<th>ACTIONS</th>
<th>STATUS</th>
<th>RESULTS</th>
</tr>
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<tbody>
<tr>
<td>Workboard helps you <strong>communicate goals</strong> and lead your team to great achievement!</td>
<td>Everyone's individual action item list is synced with team priorities and business goals – accessible from Web and mobile.</td>
<td>As work is checked off people's list or priorities change, everyone has status transparency – no need to send an email or ask for status.</td>
<td>Dashboards show progress to business goals and week over week execution metrics so everyone sees the impact of their work and risks to goal.</td>
</tr>
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Communicate Your Goals

Declare goals for your team in Workboard. They’ll be consistently visible so that your team never loses sight of the mission and purpose of their work.

Ask managers on your team to define the goals for their organization as well.

When goals are visible, accountability is easier to achieve.
Define Success
Next, set up your metrics for success. Decide who on your team will be responsible for updating progress (weekly, monthly or quarterly) and who will be able to see your progress.
Manage Workstreams

Use Workstreams to Organize Work

Plan, monitor and manage the work required to achieve your goals. Group work by goal and initiative area to more easily identify gaps and risks.

Link your workstreams to the goals and metrics they support.
Define, do and share key deliverables.
Capture deliverables and action items in Workboard so commitments are clear and execution is timely and transparent. Share and route work to stakeholders to keep it progressing smoothly.

Mark actions complete or raise the red flag and everyone has transparency – no need to send another email.

Assign action items from email and track what you’ve delegated in one place.
Your priorities and your team’s action item lists are always in sync with Workboard. Send actionable emails to Workboard and delegate easily. Workboard tracks it all, so follow up is easy and nothing gets lost or forgotten.
Motivate Your Team

Engage with your team as work progresses.

Use Weekly Check Ins to see how they’re doing and where they need help. Give badges regularly to recognize great performance. Post public comments on action items in workstreams to let the team know you’re committed to collective success.
Get progress transparency

See real-time execution status and week to week progress.

See current status wherever you are and get weekly progress reports automatically. You'll always have the facts and can manage exceptions and risks more easily.
Measure Results – Faster

Use Goals and Execution Dashboards to Track Results

Progress toward goal is always visible and no one needs to prepare the dashboard!

See weekly execution results to more quickly address risks to ensure you achieve your goals.
Pivot and Shift Priorities

Reprioritize deliverables to quickly re-align resources.

Change priorities on work across the team in one minute – everyone’s list is immediately recalibrated.

Change or update your goals and metrics to reflect new business realities.

When facts and markets change, update your goals and metrics. The whole team can see the new goals and align around new achievement targets.
The ask from the team...

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<td>Make sure you know the goals so you're contributing to and enjoy success!</td>
<td>Track your primary action items and deliverables; update your list at or after staff meetings. Use it to anchor your day.</td>
<td>Update action item status as it changes and indicate red flags and risks; see and comment on peer status.</td>
<td>Do weekly check ins and keep your list fresh. Include goal-related action items you've done, are doing and plan to do.</td>
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