

# GUIDEBOOK

## A Strategic Planning Process that Energizes Your Business

*Get Clear, Get Organized, Get Going, Get Results™*

for  
Greater Phoenix SCORE



**Facilitated by Ray Madaghiele**

**January 11, 2017**



*Business Energizers*, a division of the Transformational Learning Center (TLC)

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# INTRODUCTION

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Congratulations on your decision to make an investment in your business and to help your leaders get clear, get organized, get going, and get results as quickly as possible.

Planning is vital for the success of your business—no matter how many employees you have. And you don't have to do it alone. In fact, you shouldn't. Engaging your employees in the planning process is the best way to gain enthusiastic buy-in and support.

During this workshop, I will share my secrets and proven, practical tools and tips accumulated over my 30 years of experience facilitating groups so you can...

- create an engaging, inspiring and fun opportunity to create collaboration and cooperation among all employees
- create alignment from the top of the organization to the frontline—getting everyone moving in the same direction toward the same vision and goals
- attract the right and perfect employees and customers, people who resonate with your organization's culture and aspirations
- energize and lift your organization and everyone in it to the next level of success and fulfillment

Much success and fulfillment,



Ray Madaghiele



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## DECLARATION OF UNDERSTANDING™



### **Facilitator's desires and expectations of participants...**

1. Participate wholeheartedly
2. Engage in honest, candid discussions
3. Respect each other's opinions
4. Share air time—give others the opportunity to share their ideas
5. Honor confidentiality
6. Keep discussions focused on the topic
7. Be on time
8. Act on what you learn
9. Have fun!

# AGENDA

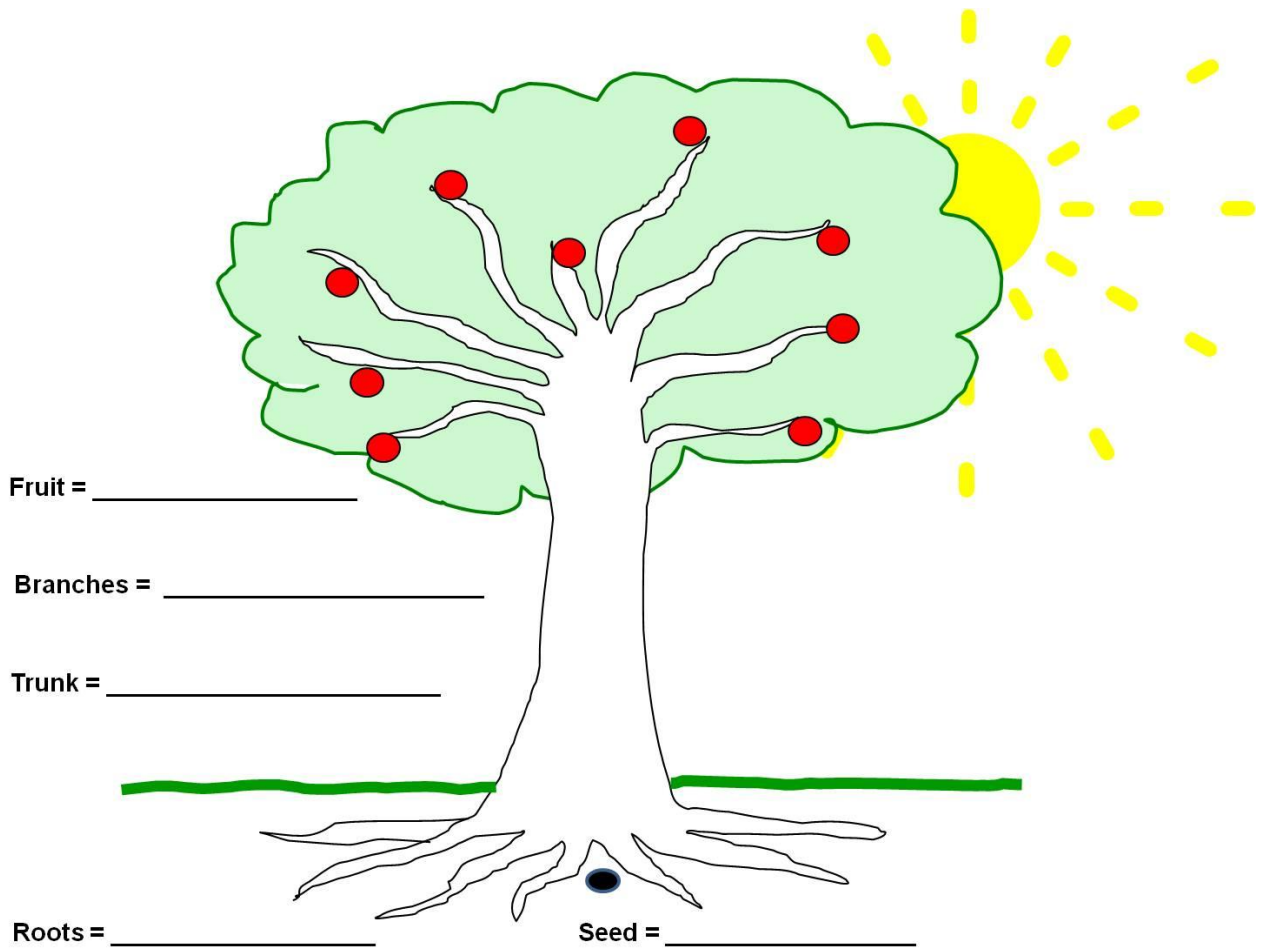


## A Strategic Planning Process that Energizes Your Business Get Clear, Get Organized, Get Going, Get Results for Greater Phoenix SCORE

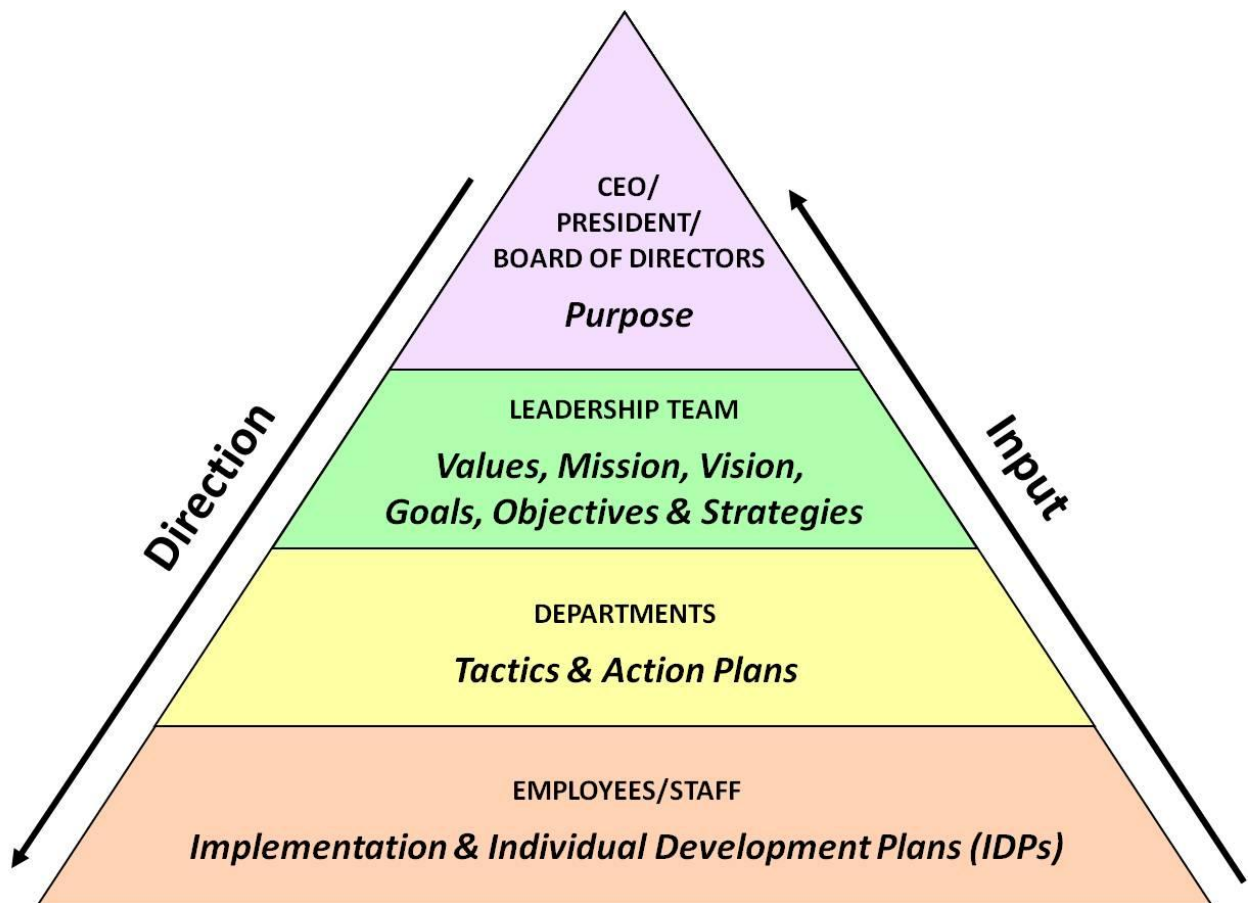
January 11, 2017  
5:30 – 8:00 p.m.

Time	Description	EYB Reference
5:30 p.m.	Welcome	
	Introductions	
	Declaration of Understanding	
	Today's Agenda	
5:45	<b>Overview</b>	Introduction
	• Tree of Organizational Success	p. 2
	• Strategic Alignment Model	p. 5
6:00	<b>Get Clear (Potential Energy)</b>	1 <sup>st</sup> Phase (p. 7)
	• Circle of Success Assessment: See where you are	Chapter 1 (p. 9)
	• 12-Step Planning Process	Introduction (p.1)
	• Core Purpose: Remember Your "Big Why?"	Chapter 2 (p. 13)
	• Core Values: Infuse Your Culture	Chapter 3 (p. 21)
	• Mission Statement: Know Your Business	Chapter 4 (p. 29)
	• Vision: Envision Your Future	Chapter 5 (p. 37)
7:00	Break	
7:10	<b>Get Organized (Potential Energy)</b>	2 <sup>nd</sup> Phase (p.51)
	• SPOC Analysis: Do Some Soul Searching	Chapter 6 (p. 53)
	• Focus Your Energy on Your Cone of Influence	Chapter 7 (p. 57)
	• Goals, Objectives and Strategies: Chart Your Course	Chapter 8 (p. 63)
7:30	<b>Get Going (Kinetic Energy)</b>	3 <sup>rd</sup> Phase (p. 73)
	• Action Plans: Prepare for Ignition	Chapter 9 (p. 75)
	• Implement: Keep the Energy Flowing	Chapter 10 (p. 89)
	o 7 Energizing Ways to Engage Employees	Chapter 10 (p. 91)
	o Individual Development Plans	Chapter 10 (p. 91)
	o Declarations of Understanding	Chapter 10 (p. 92)
	o Deliver 24k Gold Service	Chapter 11 (p. 97)
	o OWNERSHIP Principles	Chapter 11 (p. 100)
7:40	<b>Get Results (Kinetic Energy)</b>	4 <sup>th</sup> Phase (p. 107)
	• Measure Your Progress	Chapter 12 (p. 109)
	• Cycle of Teams	Chapter 13 (p. 117)
7:50	<b>Closing Comments</b>	
	• Step-by-Step Facilitator's Guide	(p. 125 - 186)
	- Planning to Plan: Set the Right Energy	Chapter 15 (p. 127)
	• Additional Resources	

# TREE OF ORGANIZATIONAL SUCCESS



# STRATEGIC ALIGNMENT MODEL



# STRATEGIC PLANNING PROCESS



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# GLOSSARY OF STRATEGIC PLANNING TERMS

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**Planning** – A formal, systematic ongoing process for making decisions to bring about a desired future state.

**Strategic Planning** – The process of examining the entire organization in the environment in which it exists. It incorporates all levels of planning: services, budgeting, and operations.

**Core Values** – The desired behaviors and underlying “guiding principles” of how decisions are to be made by each person in the organization.

**Core Purpose & Mission** – Clear and concise statements that answer respectively the following questions: “Why are you here?” and “What business are you in or about?”

**Vision** – A statement that paints a vivid picture of the desired future state of the organization.

## **SPOC Analysis – Environmental Scan**

- History and major trends
- **S**trengths and **P**ossible Improvements
- **O**pportunities and **C**hallenges

**Gap** – The difference between the present state of the organization and the desired future state (Purpose, Values, Mission, and Vision).

**Goals** – Typically, goals are broad statements of intention. A goal is defined as a broad aim toward which your efforts are directed. It’s a “what,” not a “how.” In other words, it tells you where you are going rather than how you will get there. Goals should be consistent and in alignment with the Purpose, Values, and Mission and move the organization toward its Vision.

**Objectives** – Objectives are closely tied to goals. The two terms are often used interchangeably—but Goals and Objectives are different. An Objective is a specific and measurable milestone that must be achieved in order to reach a Goal. Each Goal may include several Objectives.

**Strategies** – A Strategy is a way to achieve an Objective. Strategies tell you how you’re going to get there, the overall direction you are going to take. Each Objective may include several Strategies.

**Tactics** – A Tactic is a specific action step required to deliver on a Strategy. Tactics are what you do; and for every Strategy, there are a number of Tactics.

**Implementation** – The phase of strategic planning that involves taking action, monitoring progress, making mid-course corrections and updating the plan if necessary due to unforeseen circumstances.



# CIRCLE OF SUCCESS MATRIX ASSESSMENT

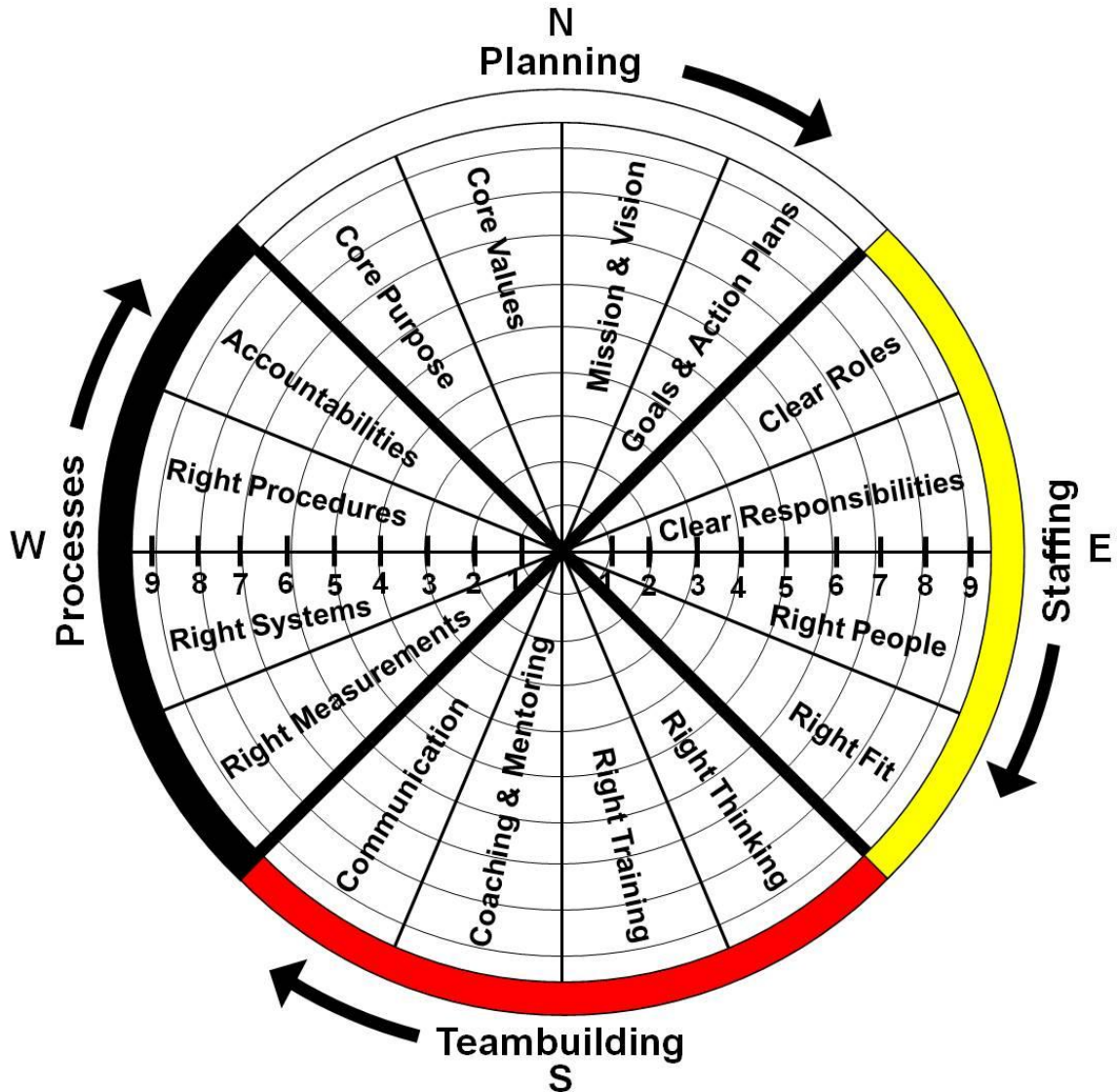
**Instructions:** Rate your present level of success in each of the key sectors identified below that contributes to the prosperity of your organization. A ten (10) indicates that you are effective and efficient in that area and couldn't be more successful if you tried. A zero (0) indicates that your organization is performing extremely poorly in that area and couldn't do worse if you tried.

Key Sectors	Rating (0 to10)
<b>PLANNING</b>	
<b>Core Purpose:</b> <i>You have a written core purpose that identifies why your organization exists—your employees understand it and factor it into the heart of their decisions and actions.</i>	
<b>Core Values:</b> <i>You have a set of written core values that guide employees' behaviors and how they treat each other and your customers. The values are promoted and enforced consistently.</i>	
<b>Mission &amp; Vision:</b> <i>You have a written mission statement that clearly defines your business, and a vivid vision of your desired future state that provides your employees clear direction.</i>	
<b>Goals &amp; Action Plans:</b> <i>You have identified in writing the goals, objectives, strategies, tactics, schedules, and resources required to achieve your purpose, mission, vision, and values.</i>	
<b>STAFFING</b>	
<b>Clear Roles:</b> <i>Your employees understand their unique roles in the organization—their piece of the puzzle—and how their roles are important to the success of the organization.</i>	
<b>Clear Responsibilities:</b> <i>Your employees understand their job duties and responsibilities and their bosses' desires and expectations of them so they can be successful.</i>	
<b>Right People:</b> <i>You have hired the right people who possess the necessary attitude, skills, and knowledge for the organization to be successful and for them to be fulfilled.</i>	
<b>Right Fit:</b> <i>You have placed your employees in the right jobs that match their talents, skills, abilities, and passions to maximize their potential and optimize their contribution.</i>	
<b>TEAM BUILDING</b>	
<b>Right Thinking:</b> <i>Your employees make good, confident decisions— with minimum supervision— that are in the best interest of the organization, customers, and their team.</i>	
<b>Right Training:</b> <i>You provide employees with the necessary training for them to develop the right attitude, skills, and knowledge to perform their jobs effectively and efficiently.</i>	
<b>Coaching &amp; Mentoring:</b> <i>You provide employees with developmental coaching and mentoring opportunities to help them reach their goals and achieve success.</i>	
<b>Communication:</b> <i>Communication flows effectively and efficiently throughout the organization such that employees are kept informed and given ample opportunity for feedback.</i>	
<b>PROCESSES</b>	
<b>Right Measurements:</b> <i>Progress is measured so that it is always clear how well things are going toward fulfilling the values, mission, vision, goals, objectives, strategies, and tactics.</i>	
<b>Right Systems:</b> <i>Required systems (high-tech &amp; low-tech) are established to make the goals, objectives, strategies, and tactics operational and deliverable—effectively and efficiently.</i>	
<b>Right Procedures:</b> <i>Procedures are identified in writing for effectively and efficiently accomplishing the different processes in the different departments.</i>	
<b>Accountabilities:</b> <i>Employees understand their commitments and responsibilities and are encouraged to be self-accountable—supervision holds them accountable if necessary.</i>	

# CIRCLE OF SUCCESS



*Maximizing Alignment and Performance*



**In which sectors has your organization already maximized performance (9 or 10)?**

**In which sectors do you have flat/low spots in which performance should be improved?**

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# CORE PURPOSE

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**Do you know your “Big Why”—your Core Purpose? If not, lasting success may elude you.**

The core purpose of your organization is like the seed of an apple. You can count the number of seeds in an apple, but you can't count the number of apples in a seed. No one knows the potential yield of your organization and how much your employees can produce in the lifetime of your company.

*“Cause and effect, means and ends, seed and fruit, cannot be severed; for the effect already blooms in the cause, the end pre-exists in the means, the fruit in the seed.”*

~Ralph Waldo Emerson

Your organization has a unique core purpose for serving the world. This is your “Big Why?”—why your organization was started in the first place—beyond just making money. What's yours? It is most likely the original heartfelt reason you decided (or are deciding) to take a leap of faith and start a business.

Knowing your core purpose keeps you centered on what's most important—during good times and challenging times.

Remember when you first got excited about the idea of starting your own business—when you got goose bumps just thinking about it? Where were you? What was *your* inspired idea that grew into *your* “Big Why?” for doing it—beyond just making money? The answer is something very simple and profound at the core of your mission as an organization.

This is the core purpose of your company. It should be at the heart of everything you do, all the decisions you make. It is why your organization exists. It either solves a problem or fulfills an aspiration or desire. It is the seed that, when properly nurtured, will begin to take root.

Once you and your employees understand your core purpose and have placed it at the heart of everything you do, everyone involved will make good, sound decisions. It will be a compass for all you choose to do.

Here are some examples of core purposes from successful companies that you probably know:

- Disney – “To bring happiness to millions”
- Nordstrom – “Service to the customer above all else”
- Johnson and Johnson – “To alleviate pain and disease”
- Walmart – “We exist to provide value to our customers”
- My company, TLC – “We inspire hope and awaken greatness”

**What's the Core Purpose of your organization?**

**Why is your organization here? Why does your organization exist?**

# CORE VALUES



*“Values are your guide for weathering ethical dilemmas.  
They become the fabric for weaving good sound decisions.”*

~ Ray Madaghiele, author of *Energize Your Business*

What behavioral values are important in the decisions made by people representing or serving your organization? They answer the questions: “How do you choose to treat each other?” and “What do you choose to stand for?”

Values are your governing principles and qualities that are your organization’s highest priority. Your organization’s value system consists of the standards and principles upon which individuals and departments base their decisions and actions. Values form the foundation, support and direction for your decisions. In essence, they are the compass for your choices.

Value	Description

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# MISSION



*"When you discover your mission, you will feel its demand. It will fill you with enthusiasm and a burning desire to get to work on it."*

~ W. Clement Stone

1. Describe what you understand your organization's present purpose and mission to be.
2. List any questions, ideas, or concerns you have about the present mission.
3. What might be the best mission for your organization now and in the future? It should answer the following questions:
  - A. How do you choose to have people behave (*Values*)?
  - B. Why is your organization here? – Why does it exist? (*Purpose*)?
  - C. What does your organization do (important *Roles* or *Services*)?
  - D. What *Results* do you choose your organization to have?
  - E. Who does your organization serve?

## **Present Mission**

## **Concerns with the Present Mission**

## **New Mission**

# VISION



*"If you can dream it, you can do it."*

~ Walt Disney

## **What is your vision of the organization in its desired future state?**

Write a statement or description of what you see. It may include:

Technical skills  
Systems  
Services  
Results achieved

Staffing  
Facilities  
Allies  
Others

Finances  
Marketing/Sales  
Clients/Customers

## **Present Vision**

## **Concerns with the Present Vision**

## **New Vision**

# STRENGTHS & POSSIBLE IMPROVEMENTS

1. List the major strengths and possible improvements of your organization.
2. Identify which strengths and possible improvements will be most critical to your organization's future success.

Strengths	Possible Improvements

# OPPORTUNITIES & CHALLENGES



1. List the major opportunities and challenges your organization will face in the next 1 to 3 years.
2. Identify the opportunities and challenges that are most critical to your organization's future success.
3. Opportunities and challenges may be assessed in the following areas:

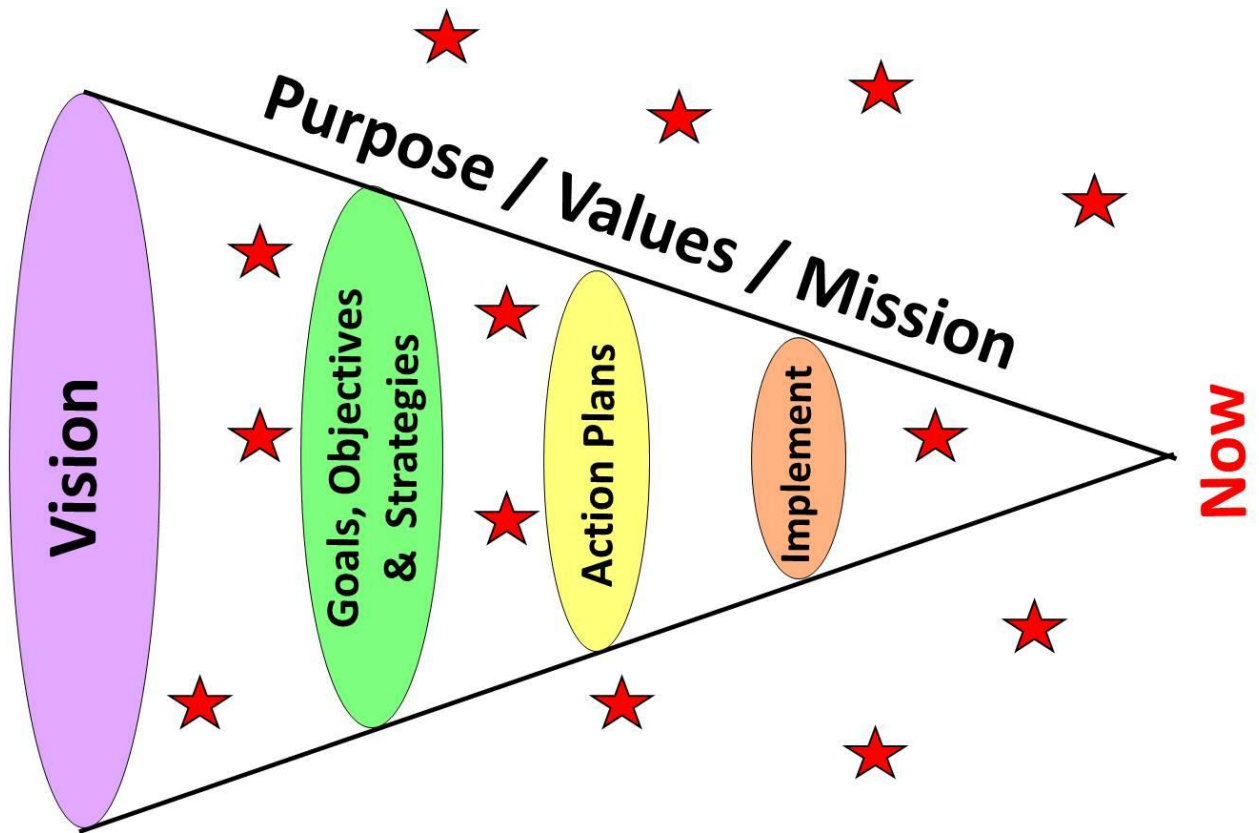
- |                  |                        |                 |
|------------------|------------------------|-----------------|
| Technical skills | Staffing               | Finances        |
| Systems          | Facilities             | Marketing/Sales |
| Services         | Economy                | Competitors     |
| Allies           | Organizations/agencies | Other?          |

Opportunities	Challenges



# FOCUSING YOUR ENERGY

( YOUR CONE OF INFLUENCE )



# GAP ANALYSIS



What are the gaps that exist between the present state and the desired future state?

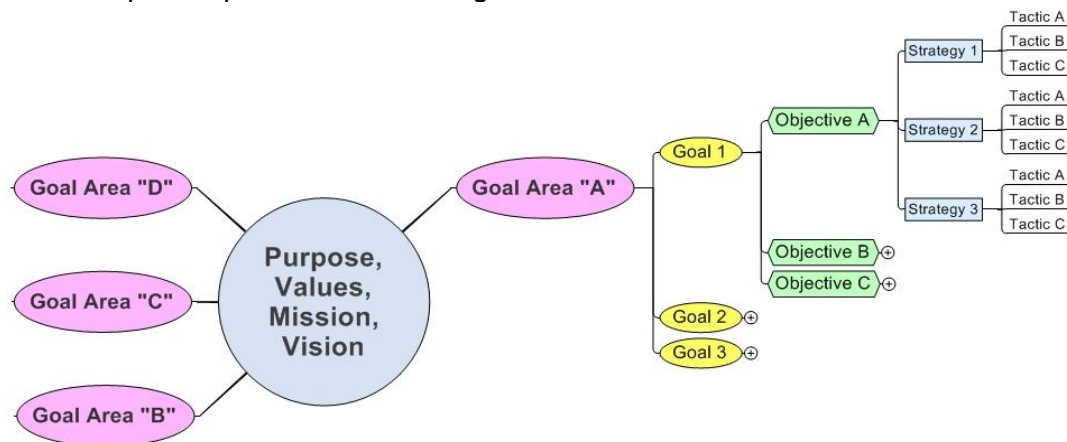
Gaps are discrepancies between the organization's desired future state (values, vision, purpose and mission) and its present performance. These discrepancies, or differences of potential, are where the organization's goals and action plans should be focused. This is a reality check. It is here that it must be decided whether the gap is too wide to bridge considering the limit of available resources during the planning time span. If the gap is too large, the vision and mission may need to be modified accordingly.

Present State	Desired Future State

# GOALS, OBJECTIVES, STRATEGIES & TACTICS

Large goals need to be broken down into smaller, “bite-sized” milestones in order to get a better understanding of what it will take to achieve them. These milestones are sometimes referred to as objectives, strategies and tactics. A goal can be segmented into objectives, objectives segmented into strategies, and strategies segmented into tactics—in a cascading effect, ranging from larger to smaller segments. This is similar to a stream cascading down a mountain. With each subsequent segment, the goal becomes more refined, more clear, and more specific.

Here’s a mindmap example of this cascading effect.



Once you have identified the Goal Areas, ask yourself, “Which Goals should we focus upon in order to improve or make strides in that area?”

Then ask, “What are major milestones that need to be achieved in order to accomplish each Goal?” These milestones become your “Objectives.”

If your Objectives still seem daunting, ask yourself, “What needs to be done in order to accomplish these Objectives?” These milestones become your “Strategies.”

Then, for each Strategy, ask yourself how you’re going to do that. These strategies become your “Tactics,” or action steps. (See the example below.)

## Example of the breakdown of a Goal→Objective→Strategy→Tactic

**Goal 1:** By the end of the year, increase employee participation by 25 percent in the Wellness Program

**Objective A:** By mid-year next year, increase employee registration by 15 percent for the Weight-Loss Challenge Program

**Strategy 1:** Work with Department Managers to inform employees about the Weight-Loss Challenge Program by December 1

**Tactic A:** By this January 1, provide all Department Managers with a fact sheet about the Weight-Loss Challenge Program to distribute to employees at weekly staff meetings

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## SETTING GOALS THE S.M.A.R.T. W.A.Y.

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Here's a little guidance about setting goals the really SMART WAY. Make them...

- **Specific** (not too vague),
- **Measureable** (so you know the progress you're making),
- **Attainable** (but a definite stretch),
- **Relevant** (in alignment with your purpose, values, mission and vision),  
and...
- **Time-bound** (scheduled milestones). It is also important that you have them be...



- **Written** (this makes them more solid), and build in...
- **Accountability** (hence the need for individual development plans for your employees) and, finally, have a strong...
- **Yearning** to achieve them (never underestimate the power of enthusiasm).

# GOALS



1. Review the values, purpose, mission, vision, strengths, possible improvements, opportunities, and challenges.
2. List as many possible goals as you can think of. A goal is a broad statement of what you intend to do.
3. Prioritize goals in order of importance to the organization.
  - A = Imperative: *Must be accomplished to achieve your organization’s desired future state.*
  - B = Important: *Will enhance your organization but you can achieve your desired future state without it*
  - C = Low: *Will have no effect on reaching your organization’s desired future state.*

Goal	Priority (A, B or C)

# OBJECTIVES, STRATEGIES & TACTICS

Goal \_\_\_\_:

Work Group Leader(s):

Objectives	Strategies	Tactics
<b>Objective A:</b>	<b>Strategy 1:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>
	<b>Strategy 2:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>
	<b>Strategy 3:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>
<b>Objective B:</b>	<b>Strategy 1:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>
	<b>Strategy 2:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>
	<b>Strategy 3:</b>	<b>Tactic 1:</b>
		<b>Tactic 2:</b>
		<b>Tactic 3:</b>

## Action Plan Submittal \_\_\_\_\_ Strategic Plan

Date: \_\_\_\_\_  
 Goal: \_\_\_\_\_  
 Submitted By: \_\_\_\_\_ (Action Team Leader)

**Action Team:**


**Executive Summary of Recommendations:**

Objectives	Strategies	Tactics	Priority (A, B, C)	Start Date	Due Date	Budget (\$)

**Measurement of Success: Key Performance Indicator(s) (KPIs)**


## ACTION PLAN WORKSHEET (OPTION #2)

**Goal:**

**Objective:**

**Strategy:**

**Performance Measurement:**

Tactics/Action Steps	Priority (A,B,C)	Start Date	Due Date	Resource Investment		Responsibility/ Other Resources Required (Person/Source)
				Time (hrs)	Money (\$)	
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						



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## **7 ENERGIZING WAYS TO ENGAGE EMPLOYEES**

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1. **Gain their initial enthusiastic support and buy-in**
2. **Involve ALL employees in the process, from the CEO to the frontline**
3. **Create Declarations of Understanding (DOUs)**
4. **Keep the plan alive by establishing a team of “Eagles”**
5. **Practice transparency**
6. **Provide consistent and frequent communication**
7. **Celebrate successes often**

## INDIVIDUAL DEVELOPMENT PLANS



*“Give everyone a vested interest in the success of your organization. Involve every employee in your organization’s strategic planning process. Assign everyone a “piece of the puzzle” from the strategic plan (so that employees have a vested interest in accomplishing the goals); include those goals in their Individual Development Plans (IDPs). Their “piece of the puzzle” now becomes part of their performance review.”*

~ Ray Madaghiele, author of *Energize Your Business*

### Professional goals (tied to your organization’s strategic plan)


### Personal Development Goals


### Coaching and Mentoring Opportunities


# DECLARATION OF UNDERSTANDING™



\_\_\_\_\_ desires and expectations of

\_\_\_\_\_

Our "Common Ground": How we choose to treat each other...What we can count on each other for...	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
_____ desires and expectations of _____ performance...	
1.	
2.	
3.	
4.	
5.	
6.	
7.	

Signatures:

\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

## DELIVER 24K GOLD SERVICE™

*“As we look ahead into the next century,  
leaders will be those who empower others.”*

~Bill Gates, Co-founder, Microsoft



Do you want to improve customer loyalty and profitability dramatically? Distinguish your organization from the competition by encouraging your employees to live up to **The G.O.L.D. Standard™** by practicing the following four tenets:

**Golden Rule** – Each employee treats customers (internal and external) like pure gold.

**Ownership** – Each employee makes decisions as though he or she owns the company.

**Love Serving All** – Everyone loves his or her job and serving *all* customers.

**Diamond Rule** – By choosing to “walk a mile in the other person’s moccasins”—truly understanding the needs and desires of their customers—your employees will discover “acres of diamonds” ready for harvesting.

Master these four simple tenets, and you will differentiate your organization from the masses by showing that you truly care about your customers by providing 24k Gold Service. Let’s dig deeper into the inherent power in each of these tenets.

## **O.W.N.E.R.S.H.I.P. PRINCIPLES™**

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How well are you and your organization practicing this level of ownership? Try these **O.W.N.E.R.S.H.I.P. Principles** on for size:

**Optimism** – Owners maintain a positive, “can do” attitude, always “looking up” for opportunities and possibilities, even in the midst of chaos. They understand that we create our tomorrows through our thoughts, words and actions today.

**We Attitude** – Owners are team players who understand the power of synergy and make decisions that are in the best interest of the whole. They give credit where credit is due.

**Innovative** – Owners fearlessly express their creativity without worrying whether they will fail or look bad, understanding that each failure is a stepping stone to success. They are always looking for ways to improve processes, systems, and performance.

**Elevate** – Owners are never satisfied with the status quo. They continuously raise their own bar to higher levels of personal effectiveness and productivity—and inspire others to do the same.

**Responsibility** – Owners are accountable and assume 100% responsibility for their thoughts, words, and actions. They see themselves as active contributors to the organization’s success—and their own.

**Solution-Focused** – Owners do not dwell on problems but instead focus their attention on solutions—converting problems into goals. They do not waste energy on blaming and finger-pointing.

**Helpful** – Owners enjoy “Wowing” their customers—internally and externally. They seize each interaction as a “moment of truth” for taking the initiative to serve before being asked.

**Integrity** – Owners do what they say they will do and follow through on their commitments. They model the organization’s values and operate consistently with policies and procedures.

**Productivity** – Owners know how to manage their own enthusiasm and energy. They prioritize their goals so that everything they do is highly focused and productive.

Imagine what your life and your organization could be like with such a culture of ownership. The words “fulfilling” and “successful” come to mind.

**What is your organization doing to create a service culture of ownership?**

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# MEASURE YOUR PROGRESS

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*“My measure of success is whether I'm fulfilling my mission.”*

~Robert Kiyosaki  
Author, *Rich Dad, Poor Dad*

## **How are you going to know how well you're doing in achieving your mission, vision, and goals?**

It's time to establish performance targets that everyone will be working toward during the next two to three years. Every goal-objective-strategy should be measured in some manner. That means establishing measurement factors: some organizations call them Critical Success Factors (CSFs); others call them Key Performance Indicators (KPIs); still others call them Critical Success Indicators (CSIs). It is not important what you choose to call them. What is important is that you develop some sort of measurements to know whether or not you are always on track to achieve the results you desire.

Begin by thinking about the important metrics that indicate success. What are they for your organization? Most likely there will be some differences for each business area or line of business (LOB). Here are some possibilities:

- Gross sales
- Profitability
- Employee retention (of valuable employees)
- Employee turnover
- Defects/returns
- Production time
- Production rate
- On-time delivery
- Inventory turnover
- Sales growth
- Market share
- Cash reserve
- Research and development expenditures
- Marketing return-on-investment
- Overhead rate
- Number of users
- Number of members
- Customer satisfaction
- Employee satisfaction
- and so on, depending on the nature of your business.

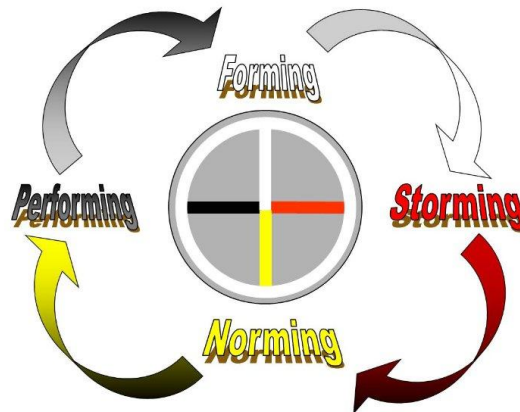
Once you have determined the important factors for each line of business, link every goal, objective, and strategy to one or more of them. Make the targets relevant, real, and trackable. Consider creating tracking spreadsheets for each performance indicator similar to Figure 14 that shows performance targets for each line of business.

First, it might be helpful to have your leaders ponder this question: “What can we be the best at in the world?”—or, at least, the best in your demographic area or industry.

Once you have identified your measurements, monitor both individual and organizational progress. Keep your employees informed by reporting progress at least monthly. For more critical goals, you may need to report weekly or even daily.

The important thing is to establish monitoring systems that can give you real-time data. The systems can be high tech or low tech, depending on your comfort level and preferences.

## The Cycle of Teams



1. **Forming** – The team is formed. People come together and begin checking each other out and discovering why each person is there. Everyone is pleasant. No one wants to rock the boat. Everyone is becoming clearer about his or her various tasks, roles and responsibilities, and how those elements fit into the big picture. It is analogous to dipping a toe into a body of water to test the temperature before fully committing to dive in. This phase is vital in order to reach the next level of maturity in the cycle...
2. **Storming** – In this phase, people are refining their understanding of their roles and responsibilities and are becoming bolder and more comfortable about sharing their thoughts and feelings. People are more authentic in expressing their unique personalities. Conflicts naturally arise as team members share differing ideas and opinions. They are prone to take a stand on key issues. This phase is vital to reach the next level of maturity in the cycle...
3. **Norming** – Conflicts are resolved. The group becomes clear about its collective vision, mission, and goals. Team members understand their individual roles and responsibilities. The group reaches agreement regarding what is in the best interest of all concerned. Individuals detach from their selfish positions and align with what's important to the group as a whole. This phase is essential in reaching the next level of maturity in the cycle...
4. **Performing** – Things are humming along. Actions are being implemented. The group synergistically moves forward in alignment with its vision, mission, and goals, with an eye on doing what's in the best interest of all concerned. Communication is compassionate, open and free-flowing. Everything is progressing according to plan. People feel great about what they are accomplishing together as a team.

Note: Teams don't go through the four phases of the cycle only once. It's continual! Whenever a new team member joins, or an existing member leaves, or the team goals change, the team leader needs to guide the team through the cycle again. The good news is that it typically takes much less energy to complete the process than it does during the initial cycle.

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## ENERGIZING INSIGHTS & DISCOVERIES



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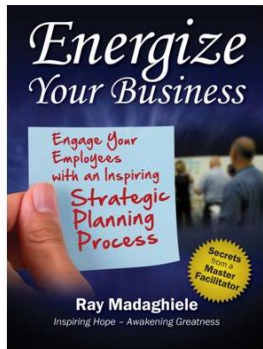


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## Ray Madaghiele's Biography

*Business Energizer ~ Master Facilitator & Coach ~ Chief Inspiration Officer*



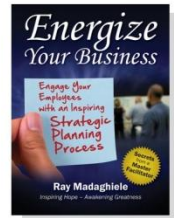
Ray has more than 30 years' experience facilitating, training, speaking, and coaching in organizations and communities across the United States. The engaging processes and proven principles he shares inspires people to "get clear, get organized, get going, and get results."

His facilitation specialties include strategic planning, leadership retreats, community visioning, problem solving, and employee engagement focus groups. Ray uses an engaging, interactive facilitative style that draws out and captures participants' best ideas in a remarkably short period of time.

His customized training and speaking specialties focus on leadership, team-building, strategic planning, goal setting, customer service, creative problem solving, effective communications, human relations, project management, and time management.

His leadership success coaching assists leaders to accelerate the implementation of facilitation and training outcomes in their organizations and in their personal and professional lives.

Ray is the author of *Energize Your Business: Engage Your Employees with an Inspiring Strategic Planning Process* in which he shares his facilitation secrets, proven tools, and success tips.



***"Your facilitation was well prepared, your delivery polished, and the end result speaks directly to what we all had in mind."***

~Duane Black, former C.O.O., SunCor Development, Co-author of *The Hand-Off Manager*

### Area of Expertise

Ray works with enlightened leaders who want to create an energized, fulfilling environment in which individuals and teams grow and thrive.

### Content and Outcomes

Ray Inspires Hope and Awakens the Greatness in organizations like yours by having them...

- **Get Clear** about their unique company culture and strategic direction
- **Get Organized** to achieve their vision, mission and goals
- **Get Going** with everyone on the same page and moving in the same direction
- **Get Results** in the form of success and fulfillment

***"I have known Ray for over 20 years, and all that time, he has served as my 'life coach.' You'll hear truth from him, and you will move forward toward realizing your greatest dreams."***

~Chief Master Bill Babin, ATA 8<sup>th</sup> Degree Black Belt and Business Owner

## Contact Ray...

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