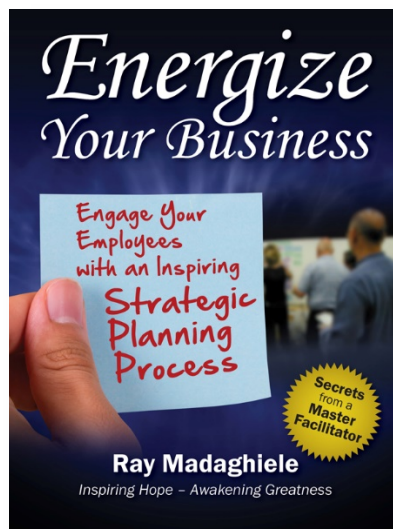


STRATEGIC PLANNING GUIDEBOOK

A Companion to

Energize Your Business:
*Engage Your Employees with an Inspiring
Strategic Planning Process*



by Ray Madaghiele

Clarify ~ Organize ~ Act ~ Realize™



- Clarify
- Organize
- Act
- Realize

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Published by
Ray Madaghiele
Transformational Learning Center, the publishing division of Lynray Inc.
3916 N. Potsdam Ave., Ste. 3946
Sioux Falls, SD 57104

Phone: (480) 495-7152
Ray@BusinessEnergizers.net
BusinessEnergizers.net

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INTRODUCTION



This Strategic Planning Guidebook is designed for anyone desiring to facilitate the strategic planning process for their organization. It is structured to be a companion to *Energize Your Business: Engage Your Employees with an Inspiring Strategic Planning Process* by Ray Madaghiele.

The guidebook contains actual participant worksheets and handouts (with brief descriptions from the *Energize Your Business* book) that the author personally utilizes to facilitate planning sessions for his clients.

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.

Do you want to get clear, get organized, get going, and get results as quickly as possible? If that's what you're looking for, this guidebook paired with *Energize Your Business* is for you.

A strategic planning process done well . . .

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

Throughout *Energize Your Business*, the author shares his secrets and proven, practical tools and tips accumulated over his 25 years of experience facilitating groups. You will read stories and examples of successful companies who have implemented the very principles and processes discussed in this book.

After reading *Energize Your Business* and facilitating your group using this guidebook, you will view strategic planning in a new light—as one of the best ways to truly engage your employees in the success of your organization. You'll see just how easy, fun, and inspiring the process can be for everyone involved.

*** SAMPLE AGENDA 1 ***

PLANNING RETREAT #1: SEE THE BIG PICTURE

8:00 a.m. – 4:30 p.m.

(Insert date)

(Insert location)

Time	Description	Responsibility
7:30 a.m.	<ul style="list-style-type: none"> Continental breakfast Welcome: Why are we here? Introductions: <ul style="list-style-type: none"> Name What do you do in the organization? Introduce facilitator 	(Insert host name)
8:00	Overview	Facilitator (Insert name)
8:05	Declaration of Understanding (DOU) for today <ul style="list-style-type: none"> Participants' desires and expectations Facilitator's desires and expectations 	Facilitated by (Insert name)
8:15	Brainstorm the past year's successes	Facilitated by (Insert name)
8:30	Tree of Organizational Success	Facilitated by (Insert name)
8:40	Create/refine CORE PURPOSE <ul style="list-style-type: none"> Why does your organization exist? 	Facilitated by (Insert name)
10:15	Break	
10:30	Identify CORE VALUES (Behaviors) <ul style="list-style-type: none"> How do you want to treat each other? What does your organization choose to stand for? 	Facilitated by (Insert name)
12:30 p.m.	Lunch	
1:00	Create/refine MISSION statement <ul style="list-style-type: none"> What business are you in or about? 	Facilitated by (Insert name)
3:00	Break	
3:15	Review the organization's existing VISION <ul style="list-style-type: none"> What is your Ideal Future State? 	Facilitated by (Insert name)
4:15	Closing Comments <ul style="list-style-type: none"> Next steps 	Host & Facilitator (Insert names)
4:30 p.m.	Adjourn	(Insert host name)

*** **SAMPLE AGENDA 2** ***

PLANNING RETREAT #2: FOCUS YOUR ATTENTION ON YOUR INTENTIONS

8:00 a.m. – 4:30 p.m.

(Insert date)

(Insert location)

Time	Description	Responsibility
7:30 a.m.	Breakfast & Welcome	(Insert host name)
8:00	Insights & Discoveries since Retreat #1	Facilitated by (Insert name)
8:10	Overview of today's retreat	Facilitated by (Insert name)
8:15	CIRCLE OF SUCCESS Assessment	Facilitated by (Insert name)
9:15	SPOC Analysis <ul style="list-style-type: none"> • <i>Strengths</i> • <i>Possible Improvements</i> • <i>Opportunities</i> • <i>Challenges</i> 	Facilitated by (Insert name)
10:15	Focus Your Attention on Your Intention (Cone of Influence)	Facilitator (Insert name)
10:30	Break	
10:45	Timeline: Expand your organization's VISION	Facilitated by (Insert name)
12:15	Lunch (with discussion about expanded vision)	
1:00	Identify priority THEMES & FOCUS AREAS	Facilitated by (Insert name)
1:30	Identify overreaching GOALS (INTENTIONS)	Facilitated by (Insert name)
3:30	Break	
3:45	Begin identifying OBJECTIVES/ STRATEGIES to accomplish Goals	Facilitated by (Insert name)
4:15	Closing comments	Host & Facilitator (Insert names)
4:30 p.m.	Adjourn	(Insert host name)

*** **SAMPLE AGENDA 3** ***

PLANNING RETREAT #3: BEGINNING YOUR ACTION PLANS

8:00 a.m. – 4:30 p.m.

(Insert date)

(Insert location)

Time	Description	Responsibility
7:30 a.m.	Breakfast & Welcome	(Insert host name)
8:00	Insights and Discoveries since Retreat #2	Facilitated by (Insert name)
8:15	Overview of today's retreat	Facilitator (Insert name)
8:20	Strategic Alignment Model	Facilitator (Insert name)
8:30	Refine & Prioritize GOALS, OBJECTIVES and STRATEGIES	Facilitated by (Insert name)
10:30	Break	
10:45	Begin identifying TACTICS/ACTIONS to accomplish Objectives/Strategies (ACTION PLAN Worksheets)	Facilitated by (Insert name)
12:00	Lunch	
12:30	Continue developing ACTION PLAN Worksheets	Facilitated by (Insert name)
2:30	Break	
2:45	Create Declarations of Understanding between levels of leadership	Facilitated by (Insert name)
4:00	Begin establishing Action Teams for each Goal Area	Facilitated by (Insert name)
4:15	Closing comments—Next Step; Invite Action Teams	Host & Facilitator (Insert names)
4:30 p.m.	Adjourn	(Insert host name)

*** **SAMPLE AGENDA 4** ***

PLANNING SESSION #4: COMPLETING YOUR ACTION PLANS

8:00 – 1:00 p.m.

(Insert date)

(Insert location)

Time	Description	Responsibility
7:30 p.m.	Breakfast, Welcome & Introductions	(Insert host name)
8:00	Overview of today's planning session	Facilitator (Insert name)
8:05	Review key strategic planning principles	Facilitator (Insert name)
8:20	Review/refine strategic planning elements <ul style="list-style-type: none"> • <i>PURPOSE</i> • <i>VALUES</i> • <i>MISSION</i> • <i>VISION</i> • <i>FOCUS AREAS</i> 	Facilitated by (Insert name)
9:50	Establish Action Teams	Facilitated by (Insert name); Presented by Action Team (AT) Leaders
10:00	Break	
10:15	Action Teams meet to review/refine ACTION PLANS <ul style="list-style-type: none"> • <i>GOALS</i> • <i>OBJECTIVES</i> • <i>STRATEGIES</i> • <i>TACTICS</i> • <i>Priorities</i> • <i>Dates</i> • <i>Resource requirements</i> • <i>Assignments</i> 	Facilitated by (Insert name); Presented by AT Leaders
11:45	Action Team reports (4 groups; 5 min. each)	Facilitated by (Insert name)
12:15 p.m.	Closing comments—Keeping It Alive!	Host & Facilitator (Insert names)
12:30	Lunch	
1:00	Adjourn Planning Session	(Insert host name)

TREE OF ORGANIZATIONAL SUCCESS



Seed = Purpose

Every tree begins with a seed. The tree exists within the seed. Each seed has a specific, unique purpose. A pine-cone seed can grow up to be only a pine tree. An acorn can grow up to be only an oak tree. An apple seed can grow up to be only an apple tree. Every organization has a unique core purpose for how to serve the world. This is “the big why?”—the reason the organization was started in the first place—beyond just making money.

Roots = Values

With the right amount of sun, water and minerals from the earth, the seed begins to sprout roots. Roots help to nourish the tree by drawing water and minerals up from the soil. They also help to stabilize the tree against external forces like wind and floods. Roots also stabilize the tree within the surrounding soil, which can become weak from erosion. Roots are invisible to the eye, but they serve the tree in several other important ways. The deeper and wider the root system, the more nourishment the tree will receive. Roots represent the core values and culture in an organization. They are what your organization stands for. They are your legacy. The more widespread and deeply imbedded your core values, the more likely it is that your organization will stand the test of time.

Trunk = Spirit / Life-force Energy = Mission and Vision

When the tree’s roots spread out and deepen enough, the tree begins to sprout and break through the surface of the earth. It first becomes visible as a delicate sprout that eventually forms the trunk. As the tree grows tall for all to see, its life-force energy and spirit becomes evident.

The trunk of the tree is analogous to the mission and vision of an organization. Everyone can see and experience the magnitude of its energy and presence. The mission and vision are the life-force, or spirit, of the organization. Many will be prospered, served and inspired during the life of the organization.

Branches = Departments and Goals Set

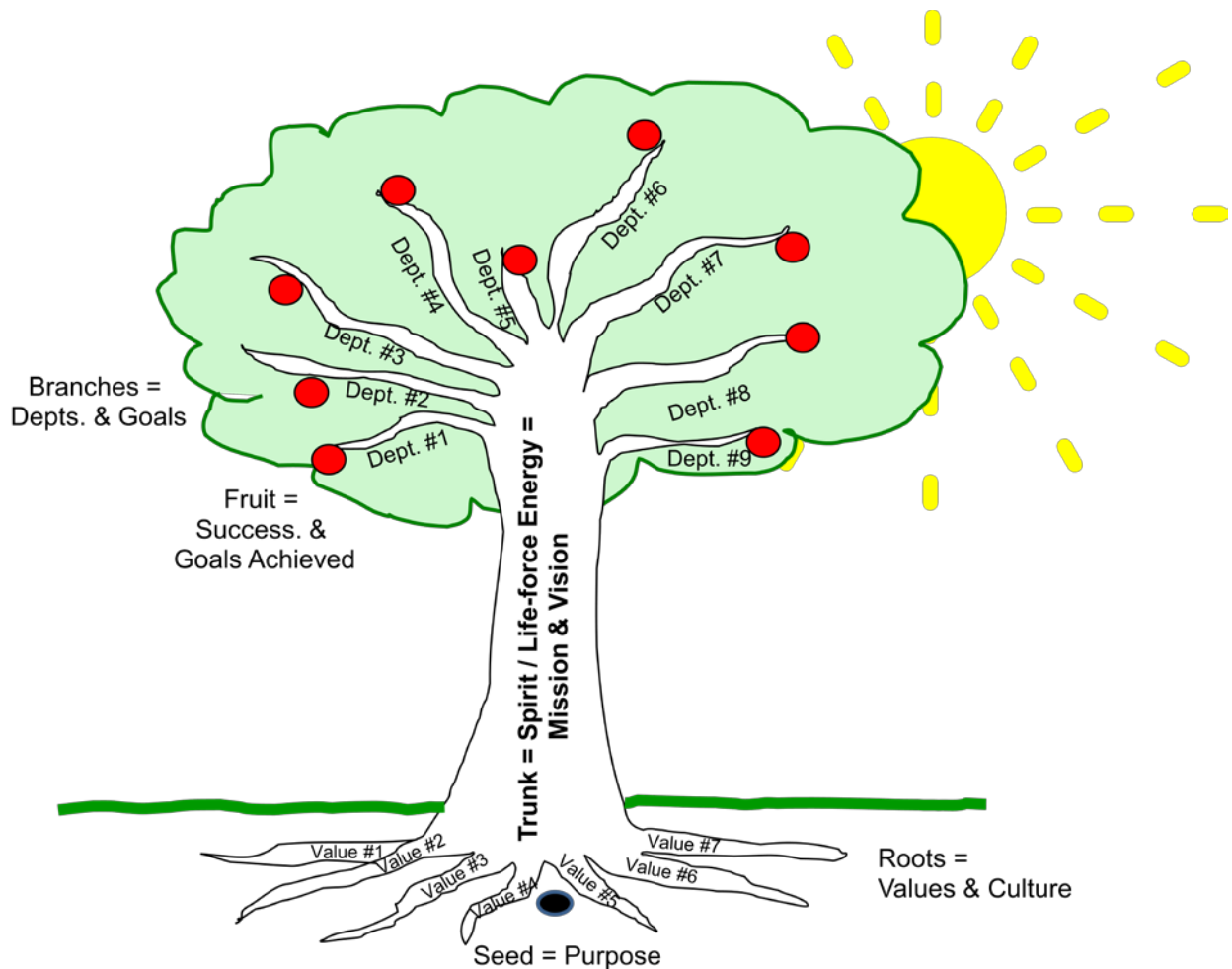
Branches bud and spread out from the trunk in all directions. These branches will support the foliage and fruit that will come. The greater the reach of the branches and canopy, the more fruit the tree is capable of producing. It soon begins serving animals and insects—providing shade, food and refuge.

The branches symbolize the various departments and the multiple goals of the organization. The loftier the goals set throughout your organization, the greater the potential for organizational and personal achievement. As personal growth trainer Les Brown says, “Shoot for the moon; and if you miss, you will still be among the stars.”

Fruit = Success and Goals Achieved

As fall approaches, the world begins to see apples form on an apple tree. You—and the world—can now see how plentiful the harvest will become, weather and critters permitting. The fruits of your labor are becoming visible. The fruit harvest represents goals achieved, success manifested. A bountiful harvest serves your customers, employees and vendors.

TREE OF ORGANIZATIONAL SUCCESS



CIRCLE OF SUCCESS ASSESSMENT



Here's a simple assessment tool for you and your employees to see the "flat spots" in your organization and where you are maximizing your potential. It is an organizational medicine wheel that I call the Circle of Success

I have been using this simple, yet revealing strategic planning tool for many years with the organizations I serve. It provides leaders with a quick visual assessment of many of the ingredients that breed success and profitability in organizations. It's also a great, engaging teambuilding exercise.

In a nutshell, when you can maximize each of these sectors, you will be maximizing your organization's potential.

In general:

- when each of the "Planning" sectors is well-defined and clear to all your employees, everyone will be on the same page and moving in the same direction;
- when "Staffing" your organization, you hire the right people, assign them to the right jobs, and know that they have a clear understanding about their roles and responsibilities;
- when "Teambuilding," your employees have been given the right training, coaching, and mentoring so that they will make the right decisions; and
- when you have established the right "Processes"—measurements, systems, procedures, accountabilities, etc.—you will have primed your organization and employees to succeed in serving your customers.

I invite you to give it a try. I think you will like its simplicity and the visual impact it will have on you and your leaders. It is a most effective way to see where you need to focus energy and resources (the flat spots).

So, how well does your organization's wheel roll?

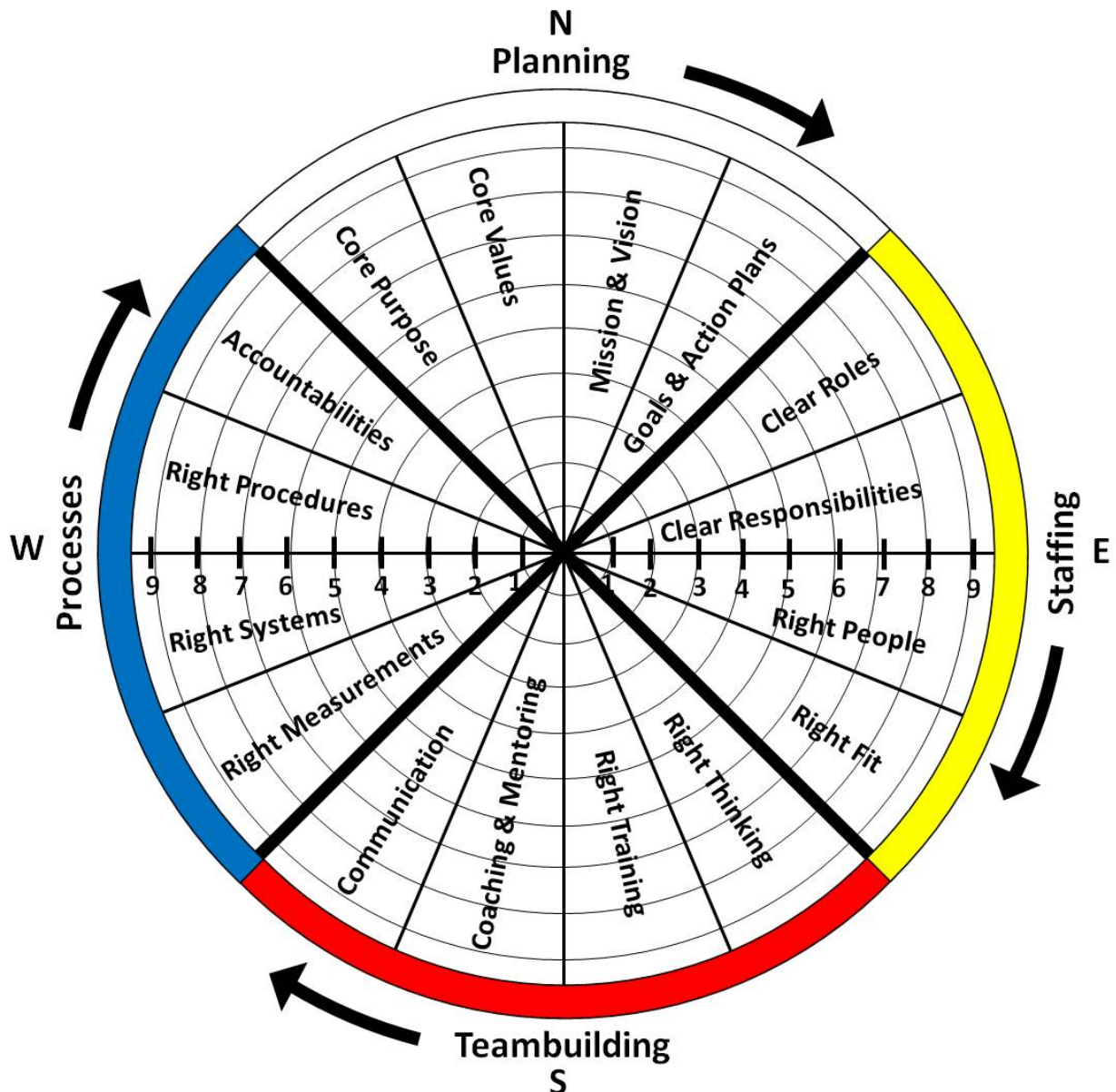
CIRCLE OF SUCCESS ASSESSMENT MATRIX

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 to 10)
PLANNING	
Core Purpose: 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.	
Core Values: You have a set of written core values that guide employees' behaviors and how they treat each other and your customers. They are promoted and enforced consistently.	
Mission & Vision: 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.	
Goals & Action Plans: You have identified in writing the goals, objectives, strategies, tactics, schedules, and resources required to achieve your purpose, mission, vision, and values.	
STAFFING	
Clear Roles: 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.	
Clear Responsibilities: Your employees understand their job duties and responsibilities and their bosses' desires and expectations of them so they can be successful.	
Right People: 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.	
Right Fit: 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.	
TEAM BUILDING	
Right Thinking: Your employees make good, confident decisions—with minimum supervision—that are in the best interest of the organization, customers, and their team.	
Right Training: You provide employees with the necessary training for them to develop the right attitude, skills, and knowledge to perform their jobs effectively and efficiently.	
Coaching & Mentoring: You provide employees with coaching and mentoring developmental opportunities to help them reach their goals and achieve success.	
Communication: Communication flows effectively and efficiently throughout the organization such that employees are kept informed and given ample opportunity for feedback.	
PROCESSES	
Right Measurements: 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.	
Right Systems: Required systems (high-tech & low-tech) are established to make the goals, objectives, strategies, and tactics operational and deliverable—effectively and efficiently.	
Right Procedures: Procedures are identified in writing for effectively and efficiently accomplishing the different processes in the different departments.	
Accountabilities: Employees understand their commitments and responsibilities and are encouraged to be self-accountable—supervision holds them accountable if necessary.	

CIRCLE OF SUCCESS ASSESSMENT

Optimizing Alignment and Performance



CONE OF INFLUENCE (FOCUSING YOUR ENERGY)

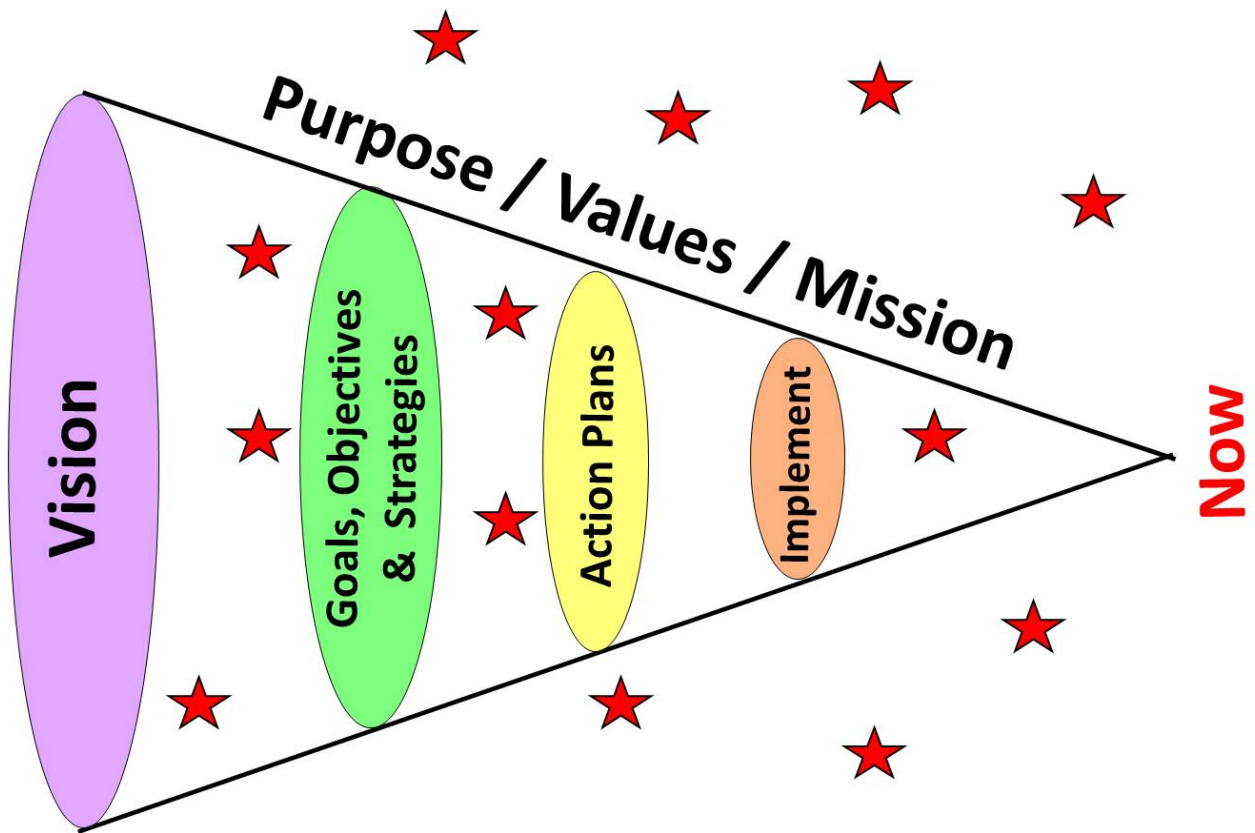


To be successful as an organization, make sure that everything you and your employees do is in alignment with what is most important to the organization—by “focusing your attention on your intention.” This model is actually a simplified way of showing how all the elements of the strategic planning process unfold and support each other—all leading to the wisest use of each moment of ‘now.’

Here’s how it works:

1. The Purpose, Values, Mission, and Vision form the “Cone of Influence” of your organization. These elements define the depth and breadth of what is important to your organization. The more lofty the Vision, the wider is the Cone of Influence.
2. The stars represent opportunities to expend or invest resources. Stars that are located outside the Cone of Influence represent opportunities to which you should say “no.” They are not in alignment with the direction of your organization. Stars that appear within the Cone of Influence represent opportunities to which you could say “yes,” depending on available resources. These are opportunities in alignment with what is important to your organization.
3. When Goals and Action Plans are developed for those opportunities within the Cone of Influence, they will help fulfill the Purpose, Mission, Values and Vision of your organization. Any pursuits of opportunities outside that realm will be wasted, scattered energy.

CONE OF INFLUENCE (FOCUSING YOUR ENERGY)



STRATEGIC PLANNING PROCESS



During the **1st Phase: Get Clear**, your employees will aspire to reach new heights with a clear picture of what you are striving to achieve as an organization.

During this first phase, you will assess your success as an organization and explore the purpose, values, mission, and vision that form the “cone of influence” of your organization. These elements define the depth and breadth of what is important to your organization. The more lofty your vision, the wider your cone of influence.

Now that you’ve gotten clear, it’s time to get organized and align your attention with your intentions.

In the previous phase, you set the direction of your organization, consequently, you created the boundaries of your cone of influence. In the **2nd Phase: Get Organized** you are ready to set relevant goals, objectives, and strategies that align with your organization’s direction. Again, the stars within the boundaries of the cone of influence are potential opportunities to use when setting your goals.

Now that you have a clear idea of the end results you want to see for the organization, it is time to map out and implement an action plan to get there. That’s the essence of the **3rd Phase: Get Going**. As you and your employees implement the actions based upon your strategic plan, consider building in the important elements of accountability, assessment, and acknowledgement so you can stay on track and keep making progress. This section delves into possibilities for doing just that.

In order to realize optimal success, your ultimate goal is to focus everyone’s attention upon the tasks necessary to implement the action plans.

In the **4th Phase: Get Results**, you will explore measuring your progress, ebbing and flowing as conditions change.

STRATEGIC PLANNING PROCESS



GLOSSARY OF STRATEGIC PLANNING TERMS



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. And the two terms are often used interchangeably—but Goals and Objectives are different. An Objective is a specific and measureable 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.

STRATEGIC ALIGNMENT MODEL



What I love about a well-done strategic planning process is that it accomplishes collaboration and cooperation throughout your organization. Having everyone participate in the process naturally creates enthusiastic buy-in and support all the way from the top tier of the organization to the frontline.

You and your employees will understand the steps for getting clear, getting organized, getting going, and getting results quickly toward your organization's next level of success— getting the results that you seek.

The Strategic Alignment Model shows what's possible with respect to involving more and more people in the process as it unfolds. It is a natural, cascading effect—similar to water flowing down terraces in a mountain stream.

In the beginning, the top leaders of the organization define and agree upon the core purpose of the enterprise.

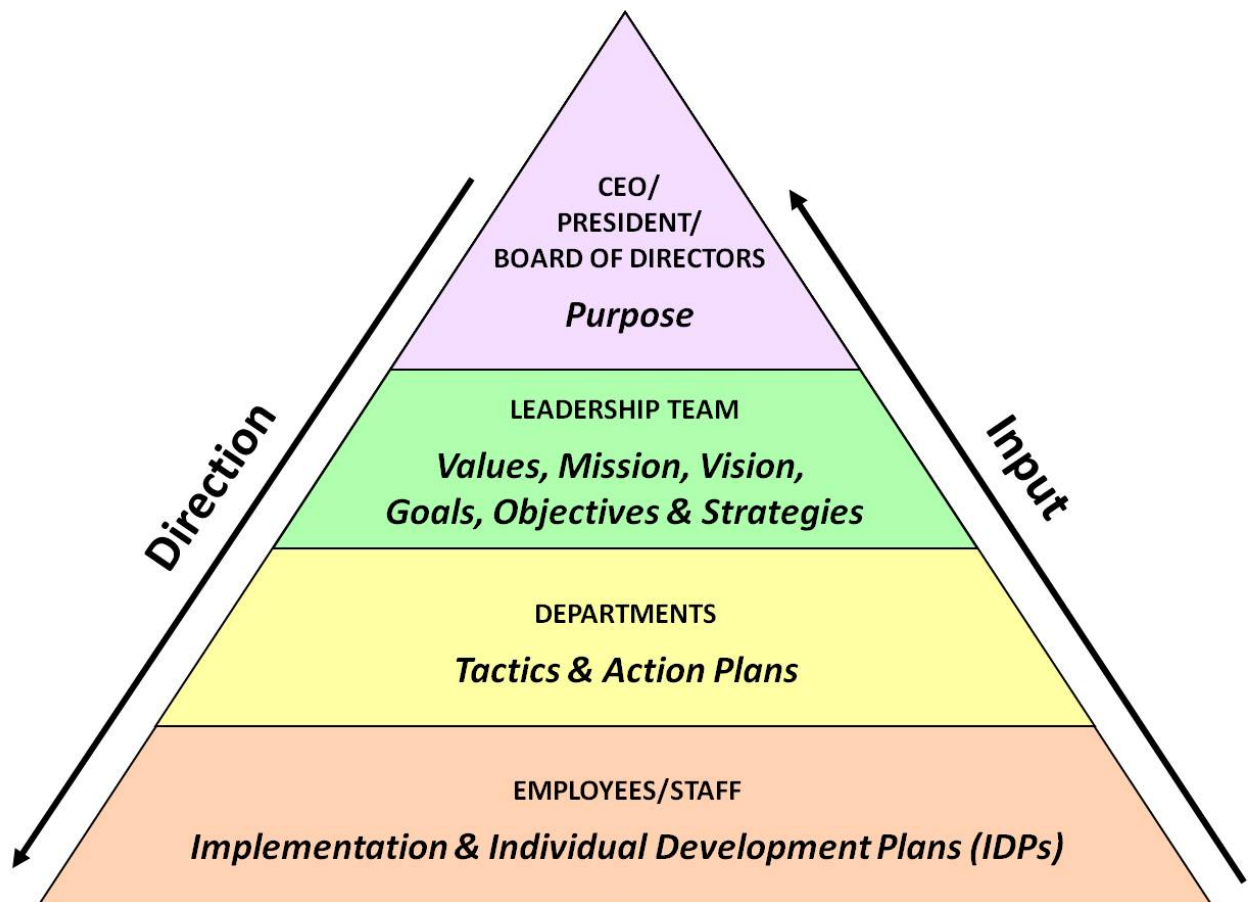
Then, middle-management becomes actively engaged with the top leaders in creating the relevant values, mission, vision, goals and strategies, with further input and constructive review from other frontline leaders.

Next, the top leaders and middle-management engage frontline leaders in establishing the tactics and beginning the action plans.

Then, the frontline leaders engage their staff such that every employee is empowered to give detailed input to complete the action plans.

And finally, departments and their individual workers establish personal goals and tasks which can now be tailored to accomplish some element of the overall strategic plan as part of each participant's Individual Development Plan (IDP).

STRATEGIC ALIGNMENT MODEL



CORE VALUES



What behavioral values are important in the decisions made by people representing or serving your organization?

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

CORE PURPOSE & MISSION



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



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
Systems
Services
Allies

Staffing
Facilities
Economy
Organizations/agencies

Finances
Marketing/Sales
Competitors
Other?

Opportunities	Challenges

GAP ANALYSIS



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

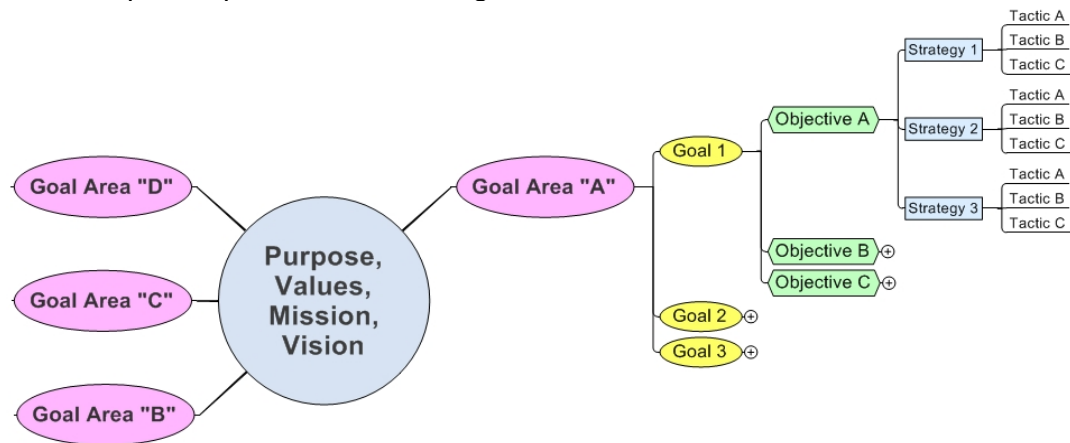
Gaps are discrepancies between the organization's desired future state (values, vision, purpose and mission) and its present performance. These discrepancies or differences of potential are where the organization's goals and action plans should be focused. This is a reality check. It is here it must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

GENERATING THE POWER OF INTENTION (THE SMART WAY)

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).

GENERATING THE POWER OF INTENTION (THE SMART WAY)



S _____

M _____

A _____

R _____

T _____



W _____

A _____

Y _____

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 achieved 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
Objective A:	Strategy 1:	Tactic 1:
		Tactic 2:
		Tactic 3:
	Strategy 2:	Tactic 1:
		Tactic 2:
		Tactic 3:
	Strategy 3:	Tactic 1:
		Tactic 2:
		Tactic 3:
Objective B: ?	Strategy 1:	Tactic 1:
		Tactic 2:
		Tactic 3:
	Strategy 2:	Tactic 1:
		Tactic 2:
		Tactic 3:
	Strategy 3:	Tactic 1:
		Tactic 2:
		Tactic 3:

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	End Date	Resource Investment		Responsibility/ Other Resources Required (Person/Source)
				Time (hrs)	Money (\$)	
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

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: _____

DECLARATION OF UNDERSTANDING™

INSTRUCTIONS – LEADER TO EMPLOYEE/TEAM

(Insert Leader's Name) desires and expectations of
(Insert employee's or Team's name)

Our "Common Ground": How we choose to treat each other...What we can count on each other for...	
1.	<i>Leader brainstorms with employee/Team what they mutually agree upon (goes both ways).</i>
2.	
3.	
4.	
5.	
6.	
7.	
<u>(Insert Leader's Name)</u> desires and expectations of <u>(Insert employee/Team's name)</u> ...	
1.	<i>Leader shares his/her personal desires and expectations with the employee/Team.</i>
2.	
3.	
4.	
5.	
6.	
7.	

Signatures:

Everyone signs

Date: _____

DECLARATION OF UNDERSTANDING™

INSTRUCTIONS – EMPLOYEE/TEAM TO LEADER

(Insert employee's or Team's name) desires and expectations of
(Insert Leader's Name)

Our "Common Ground": How we choose to treat each other...What we can count on each other for...	
1.	<i>Leader brainstorms with employee/Team what they mutually agree upon (goes both ways).</i>
2.	
3.	
4.	
5.	
6.	
7.	
<u>(Insert employee/Team name)</u> desires and expectations of <u>(Insert Leader's Name)</u> ...	
1.	<i>Employee/Team shares their personal desires and expectations with the Leader.</i>
2.	
3.	
4.	
5.	
6.	
7.	

Signatures:

Everyone signs

Date: _____

ENERGIZING INSIGHTS & DISCOVERIES



Ray Madaghiele's History, Success and Capabilities

Strategic Planning • Meeting Facilitation • Training • Coaching



Ray Madaghiele is a master facilitator, trainer, coach and speaker who has 30 years of experience helping hundreds of organizations improve their performance and solve big problems.

Ray guides organizations to make quantum leaps forward and quickly maximize their return on investment (ROI) in leadership and organizational development.

Ray has vast experience working with a diverse array of companies, non-profit organizations, and Native American communities and their enterprises.

Outcomes

- **Clarify** your unique organizational culture and strategic direction
- **Organize** to achieve your vision, mission and goals
- **Act** with everyone on the same page and moving in the same direction
- **Realize** results that exceed your desires and expectations

Client Focus

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

Resource

Ray is the author of ***Energize Your Business: Engage Your Employees with an Inspiring Strategic Planning Process*** in which he shares insights into building a more collaborative, high-performing organizational culture and a more profitable business.

Services

- **Strategic Planning**
Gain enthusiastic support for your organization's Strategic Plan through a well-engineered, engaging process.
- **Meeting Facilitation**
Assure you have an inspiring, engaging and productive meeting that accomplishes your desired objectives.
- **Leadership Training**
Create an empowering, customer-driven culture in which leaders and employees grow and thrive.
- **Coaching for Leaders**
Accelerate your leadership team's professional success and fulfillment.



Contact Ray to speak at your next event
480-495-7152 • Ray@BusinessEnergizers.net
BusinessEnergizers.net

Business Services

Strategic Planning • Meeting Facilitation • Training • Coaching

Create a successful, energized and fulfilling organization



Results

- Increase profitability
- Improve productivity
- Generate greater employee engagement, satisfaction and retention
- Enhance work/life balance

Services

- **Strategic planning**
 - Strategic planning retreats
 - Visioning focus groups
 - Strategic project planning
- **Meeting facilitation**
 - Leadership retreats
 - Employee engagement
 - Teambuilding
 - Group problem-solving
- **Leadership Training**
 - How to Facilitate Strategic Planning
 - Build High-Performing Teams
 - Effective Communication
 - Relationship building
 - Creative problem-solving
 - Goal-setting
 - Customer service
 - Project management
 - Time management
 - Create Work/Life Balance
- **Coaching for Leaders**

Clients

- Established and start-up companies
- Non-profit organizations
- Native American communities and their enterprises

Outcomes

- **Clarify** your unique organizational culture and strategic direction
- **Organize** to achieve your vision, mission and goals
- **Act** with everyone on the same page and moving in the same direction
- **Realize** results that exceed your desires and expectations



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