

Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion. – Jack Welch

Business Vision:

Review your vision statements and ask yourself whether they meet the characteristics of a good vision statement:

- Is it a coherent and powerful statement of what you would like to become? Is it based on your personal hopes, values, and interests?
- Is it challenging and far-reaching? Does it capture your imagination and encourage motivation?
- Is it future-oriented – at least 12 months out?
- Does it reflect reality – your clients, the marketplace, your community, and life?
- Can it be communicated with clarity and conviction?
- Can any words in your vision be more specific? Is your word choice strong and vivid?
- Does your vision motivate you to accomplish all the activities you will need to do to make it come to life?
- Do you have the resources in your practice to follow through on your vision? Are rolls clarified?
- What changes do you need to make?
- Your vision should be shared with clients ... is yours?

How will we get there?

The purpose of goals is to focus our attention. The mind will not reach toward achievement until it has clear objectives. The magic begins when we set goals. It is then that the switch is turned on, the current begins to flow, and the power to accomplish becomes reality. – Anonymous

Identifying and developing:

- Your yearly goals
- The approaches or strategies we are going to use to achieve our goals
- The specific activities or steps we are going to employ to carry out each strategy

What are Goals, Approaches, and Activities?

- To develop a quality business plan, it will be helpful to have a solid understanding of Goals, Approaches, Activities.
 - ✓ **Goals** are markers or milestones for which to aim in our practice, in professional development, and in our personal life. A goal is a statement articulation what outcome is to be achieved.
 - ✓ **Approaches** are the ways or paths to achieving our goals. They are the “how’s”. An approach is the action or set of actions necessary to achieve the desired results of the goal.
 - ✓ **Activities** are the steps that must be taken to implement each approach.

The SMART Model

A well-written goal has these key characteristics:

- **Specific**
- **Measurable**
- **Achievable**
- **Results-oriented**
- **Time-bound**

In using the **SMART** model to evaluate a goal, examine the model's characteristics – in this order – to keep yourself well focused:

- Results-oriented – with this goal, in what areas are you looking for results?
- Measurable – How are you going to measure the results you get in each of those areas?
- Time-bound – Do any parts of the goal have to be achieved by certain times?
- Achievable - What in your past experience indicates you are likely to be able to achieve this goal?

Goals:

1.

2.

3.

Developing our Approaches

When identifying approaches to reach our goals, keep in mind:

- your approaches may be similar to, or the same as, things you are doing now.
 - Approaches you identify as a part of your plan may seem to be nothing more than common sense.
 - Don't limit your opinions prematurely. Write down as many approaches as you can imagine – be creative! After you have captured all your ideas, you can make adjustments and prioritize.
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- ❖ Approaches to reach client acquisition goal:
 - ❖ Approaches to reach revenue and personal income goal:
 - ❖ Approaches to reach client service review goal:
 - ❖ Approaches to ...

Developing Our Activities

Once we have identified our goals and the approaches to help us achieve them, the next step is to identify the activities or actionable steps that must be taken to implement each approach. When we start developing activity plans for our approaches, begin by writing each activity or task as you think of it. After you have written all the activities, you can put them in chronological order and check for missing steps.

- How will these approaches and activities help you realize your long-term vision?
- How will they help you to get to your yearly goals?
- Do they capitalize upon your strengths or does it challenge your development needs?
- Will they serve your new or existing clients' needs, wants, and expectations?
- Do you have the commitment necessary to implement these approaches and activities?
- Who or what may get in the way of implementing them?

Now that we have written our annual goals and their supporting approaches and activities, let's consider what we can and will commit to accomplishing in the next 90 days.

Creating a 90-day game plan:

1. Review the goals, approaches and activities in your business plan and mentally select what you want to focus on over the next 90 days.
2. On the 90-day game plan form, document the approaches and activities that you are committing to over the next 90 days.
3. Determine who is responsible for each activity and document in the 90-day game plan.
4. Document a targeted completion date for every activity listed.

