

CHANGE THINKING.

LEADERSHIP MASTERY

THE FIVE LEADERSHIP SKILLS TO SUCCESS



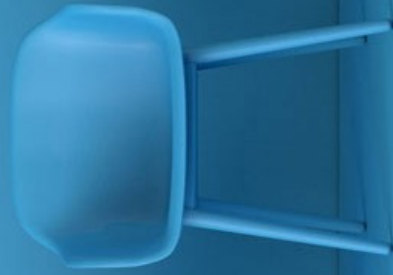
CHANGE HABITS.



STAND OUT.®

FOUNDATIONAL TOOLBOX

PLAYBOOK



UCONNECT SOLUTIONS, INC.™

UCONNECTSOLUTIONS.COM

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DETAILED SWOT ANALYSIS

S.W.O.T.	
STRENGTHS	WEAKNESSES OPPORTUNITIES THREATS
<p>Strengths</p> <ul style="list-style-type: none"> What skills drive your passion? What makes you unique? If you could choose one strength to do every day, what would it be? 	<p>Opportunities</p> <ul style="list-style-type: none"> What Opportunities would expand your growth? What trends are you seeing? What strengths can you use to turn these opportunities into reality?
<p>Threats</p> <ul style="list-style-type: none"> What threats do you feel or envision? What threats do your weaknesses expose you to? What conditions cause a threat? 	<p>Weaknesses</p> <ul style="list-style-type: none"> What do you not like to do? What disempowers you? What do you want off your plate now?

STRENGTHS

Strengths are things that you do particularly well, or in a way that distinguishes you from others. Ask yourself these questions:

- What makes you unique?
- What excites you to the point of where you feel passion and want to achieve it every day?
- What makes you tick?
- What do you do better than anyone else?

Here are some words that might jog your mind. It's important to know why you do what you do and where your skills are. This will also help you find those individuals that compliment your weaknesses and will then strengthen you and your company through their skills.

First circle or highlight all that pertain – go through the list quickly – don't overthink – just react to what resonates with you.

<input type="checkbox"/> Visionary	<input type="checkbox"/> Administration	<input type="checkbox"/> Advising	<input type="checkbox"/> Accounting
<input type="checkbox"/> Budgeting	<input type="checkbox"/> Project Management	<input type="checkbox"/> Communication	<input type="checkbox"/> Compilation
<input type="checkbox"/> Goal Setting	<input type="checkbox"/> Counseling	<input type="checkbox"/> Creativity	<input type="checkbox"/> Data analysis
<input type="checkbox"/> Delegation	<input type="checkbox"/> Detail-oriented	<input type="checkbox"/> Direction	<input type="checkbox"/> Editing
<input type="checkbox"/> Empathy	<input type="checkbox"/> Empowerment	<input type="checkbox"/> Evaluation	<input type="checkbox"/> Explanation
<input type="checkbox"/> Finalization	<input type="checkbox"/> Outline/Steps	<input type="checkbox"/> Guidance	<input type="checkbox"/> Hosting
<input type="checkbox"/> Negotiation	<input type="checkbox"/> Imagination	<input type="checkbox"/> Implementation	<input type="checkbox"/> Influence
<input type="checkbox"/> Initiation	<input type="checkbox"/> Innovation	<input type="checkbox"/> Finish Projects	<input type="checkbox"/> Interviewing
<input type="checkbox"/> Judgment	<input type="checkbox"/> Leadership	<input type="checkbox"/> Learning	<input type="checkbox"/> Listening
<input type="checkbox"/> Managing	<input type="checkbox"/> Marketing	<input type="checkbox"/> Motivation	<input type="checkbox"/> Navigation
<input type="checkbox"/> Negotiation	<input type="checkbox"/> Observation	<input type="checkbox"/> Organization	<input type="checkbox"/> Oversight
<input type="checkbox"/> Goal Achievement	<input type="checkbox"/> Planning	<input type="checkbox"/> Preparation	<input type="checkbox"/> Presentation
<input type="checkbox"/> Prioritization	<input type="checkbox"/> Product Development	<input type="checkbox"/> Proofreading	<input type="checkbox"/> Qualification
<input type="checkbox"/> Questioning	<input type="checkbox"/> Recording	<input type="checkbox"/> Customer Service	<input type="checkbox"/> Reporting
<input type="checkbox"/> Research	<input type="checkbox"/> Resolution	<input type="checkbox"/> Reviewing	<input type="checkbox"/> Sales
<input type="checkbox"/> Scheduling	<input type="checkbox"/> Simplification	<input type="checkbox"/> Speech	<input type="checkbox"/> Strategy
<input type="checkbox"/> Communication	<input type="checkbox"/> Supervision	<input type="checkbox"/> Support	<input type="checkbox"/> Teaching
<input type="checkbox"/> Team building	<input type="checkbox"/> Tracking	<input type="checkbox"/> Training	<input type="checkbox"/> Troubleshooting
<input type="checkbox"/> Understanding	<input type="checkbox"/> Uniting	<input type="checkbox"/> Liaison	<input type="checkbox"/> Upgrading
<input type="checkbox"/> Verbalization	<input type="checkbox"/> Verification	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Writing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NEXT – Pick the top three from the list above that really resonate with you.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.


You can also print it and keep it close by to refer to.

NOW - PICK THE TOP THREE STRENGTHS THAT ARE IMPERATIVE FOR YOU TO WORK ON IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

What will you do to make your strengths become even stronger?

It is important to really focus on your strengths – what does that mean to you?

Here are some ideas.

Schedule time every day to let strengths shine. When will you schedule?  (Do It Now!)

Time of day: _____ Circle what days of the week? M T W T F S S

Take strengths and begin to build additional opportunities around them. What would those opportunities be? _____

Think outside the box – be creative. Build your passion into every day and in every way – what are those ideas?

For example, your strengths might be that you are a visionary, and you love to start the process and lead others into fully developing the process. You really want to spend more time in this area.

You also realize that you have additional strengths of training and uniting teams while listening to their concerns. You know that you could really strengthen these skills while building new programs.

So, to think outside the box, you realize you could strengthen these additional skills by having your team work on building online training programs that allow you to get your message out to many more team members on a consistent basis.

Here you not only used your lighthouse abilities, but also used other team members to strengthen the skills that you already have. That's called thinking outside the box!

WEAKNESSES

Now it's time to consider your weaknesses. Be honest! A SWOT Analysis will only be valuable if you gather all the information you need. So, it's best to be realistic now, and face any unpleasant truths as soon as possible.

You will note in this quadrant that the weaknesses are in the opposite corner of the strengths – the reason for this is they are the opposite of you. Note I say the Opposite of YOU because it is.

Weaknesses are not what you are good at – even if you wanted to be good at doing them.

"IN EVERY MOMENT OF LIFE YOU SHOULD BE WHAT YOU OUGHT TO BE".

I cannot stress this point enough! So many times we focus on our weaknesses instead of pouring that energy into our passion. Trust me you will be ten times better at what you are doing if you do just this one thing “BE WHAT YOU OUGHT TO BE” – Live a life of passion!

Now is your time to really understand what you do not want to do and start thinking about who can excel in your areas of weakness to bridge this gap. With the help of others, or systems, or companies it will push you past the mundane and into a life of passion.

Let’s use the same list and now circle or highlight those areas that you are weakest in. I’ll repeat these instructions below.

What disempowers you and what do you want off your plate now. Now circle or highlight those areas. Start thinking about who or what can help you in these areas.

You do not want to spend your time on the weaknesses. Instead spend your time in those areas that you excel. This will lead YOU to...

#1 A much higher life satisfaction level

#2 Much more success for you, your company and your colleagues.

Everyone has been put on this earth for a reason – why not let them do what they are good at!

First circle or highlight all weaknesses that pertain to you – go through the list quickly – don’t overthink – just react to what resonates with you.

<input type="checkbox"/> Visionary	<input type="checkbox"/> Administration	<input type="checkbox"/> Advising	<input type="checkbox"/> Accounting
<input type="checkbox"/> Budgeting	<input type="checkbox"/> Project Management	<input type="checkbox"/> Communication	<input type="checkbox"/> Compilation
<input type="checkbox"/> Goal Setting	<input type="checkbox"/> Counseling	<input type="checkbox"/> Creativity	<input type="checkbox"/> Data analysis
<input type="checkbox"/> Delegation	<input type="checkbox"/> Detail-oriented	<input type="checkbox"/> Direction	<input type="checkbox"/> Editing
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<input type="checkbox"/> Negotiation	<input type="checkbox"/> Observation	<input type="checkbox"/> Organization	<input type="checkbox"/> Oversight
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<input type="checkbox"/> Research	<input type="checkbox"/> Resolution	<input type="checkbox"/> Reviewing	<input type="checkbox"/> Sales
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<input type="checkbox"/> Understanding	<input type="checkbox"/> Uniting	<input type="checkbox"/> Liaison	<input type="checkbox"/> Upgrading

<input type="checkbox"/> Verbalization	<input type="checkbox"/> Verification	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Writing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PICK THE TOP THREE WEAKNESSES THAT ARE IMPERATIVE TO DELEGATE IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day. You can also print it and keep it close by to refer to.

Again, start thinking about who or what can take over these areas of weakness for you so you can put all your power into your strengths.

DELEGATION IS THE KEY TO SUCCESS.

Whether that is delegation to a person, system, or outsourcing company. Think outside the box on how you can get those things that drag you down off of your list. Delegation empowers you and those that receive the skill that you delegated are now empowered!

Fill in the following:

Weakness #1

Who to Delegate to?

What system/function could be put into place to manage this area?

Is there an outsourcing firm that could help?

Other ideas for changing a weakness into a strength?

When will you implement this change?

Weakness #2

Who to Delegate to?

What system/function could be put into place to manage this area?

Is there an outsourcing firm that could help?

Other ideas for changing a weakness into a strength?

When will you implement this change?

Weakness #3

Who to Delegate to?

What system/function could be put into place to manage this area?

Is there an outsourcing firm that could help?

Other ideas for changing a weakness into a strength?

When will you implement this change?

DELEGATION EMPOWERS YOU AND THOSE THAT RECEIVE THE SKILL THAT YOU DELEGATED

OPPORTUNITIES

Opportunities are openings for something positive to happen, but you'll need to take action to claim them for yourself!

You will note that opportunities are shown in the opposite quadrant of threats. The great thing about spotting opportunities is they can many times shore up issues that could be a potential threat.

This is why you always want to keep an open mind to opportunities that may actually exist within a threat. You never know when or where your next opportunity will come from!

Being able to spot and more importantly take action when you see an opportunity makes all the difference between you and the next person in line for the opportunity.

ONLY 10% OR FEWER OF THE POPULATION ACTUALLY ACT UPON OPPORTUNITIES THAT THEY SEE

This leads you right from opportunity into Strengths. The more you act upon opportunities the stronger you will become and more confident. Many people are afraid of the unknown. It's your job to see it and do it.

Look for opportunities every day. Soon they will become apparent much more often, Don't ignore them! Venture into these areas and grow.

Think about great opportunities you can spot immediately. These don't need to be game changers: even small advantages can increase your strengths. Include words such as the following to describe your opportunities. This will strengthen your vision for success!

For example, I have an unexpected and fantastic opportunity to utilize my Leadership program to help a company get to the next level!

<input type="checkbox"/> Unexpected and Fantastic	<input type="checkbox"/> Unbelievably	<input type="checkbox"/> Appropriate	<input type="checkbox"/> Consequently
<input type="checkbox"/> Inexhaustible	<input type="checkbox"/> Unique	<input type="checkbox"/> Agreeable	<input type="checkbox"/> Continuously
<input type="checkbox"/> Favorable	<input type="checkbox"/> Extremely	<input type="checkbox"/> Suitable	<input type="checkbox"/> Ready-made
<input type="checkbox"/> Natural	<input type="checkbox"/> Perfect	<input type="checkbox"/> Risk-Free	<input type="checkbox"/> Exhilarating
<input type="checkbox"/> Incomparably	<input type="checkbox"/> Absolute	<input type="checkbox"/> Unbelievable	<input type="checkbox"/> Unusual
<input type="checkbox"/> Safe	<input type="checkbox"/> Early	<input type="checkbox"/> Easy	<input type="checkbox"/> Timely
<input type="checkbox"/> Precious	<input type="checkbox"/> Recent	<input type="checkbox"/> Obvious	<input type="checkbox"/> Formative
<input type="checkbox"/> Inspiring	<input type="checkbox"/> Positive	<input type="checkbox"/> Direct	<input type="checkbox"/> Lucrative

Do it Now!



TOP 10 OPPORTUNITIES-use the above descriptive words to bring your Opportunities ALIVE!

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Circle or highlight the Top Three Opportunities and attach one of the above words to it as mentioned above - Make it come alive!

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.

You can also print it and keep it close by to refer to.

Explain why each one is an opportunity?

What will you do with this opportunity?

When will you act upon it?

When will you make it a SMART GOAL?

THREATS

Threats include anything that can negatively affect you. Identify any threats. These are external things and events that are worrying you, or that might happen and prevent you from either achieving your goals or taking advantage of the benefits.

The best way to overcome any threat is to develop a plan to overcome these threats. We recommend a great way to do this is to look at each threat realistically and come up with three plans to overcome the threat. Choose the one that you feel will be the best solution. If that one doesn't work, then you will have Plan B & C to fall back on.

Do it Now!



Threat	Fill in 3 Solutions	Final Solution	When to Complete
#1		Choose One:	Date: _____
			Time: _____
#2		Choose One:	Date: _____
			Time: _____
#3		Choose One:	Date: _____
			Time: _____

Always remember – never make a threat bigger than it is. Write down what is the worst thing that could happen if the threat occurred. _____ Then go from there. Eliminate this wasteful worry time by developing a plan now. Make sure it is time bound and stick to the plan!

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.

You can also print it and keep it close by to refer to.

S.W.O.T WORKSHEET– Self and Team members

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Strengths</p> <ul style="list-style-type: none"> • What skills drive your passion? • What makes you unique? • If you could choose one strength to do every day, what would it be? 	<p>Opportunities</p> <ul style="list-style-type: none"> • What Opportunities would expand your growth? • What trends are you seeing? • What strengths can you use to turn these opportunities into reality? 		
<p>Threats</p> <ul style="list-style-type: none"> • What threats do you feel or envision? • What threats do your weaknesses expose you to? • What conditions cause a threat? 	<p>Weaknesses</p> <ul style="list-style-type: none"> • What do you not like to do? • What disempowers you? • What do you want off your plate now? 		

YOUR SWOT:

S _____
W _____
O _____
T _____

TEAM MEMBER'S SWOT

NAME _____
S _____
W _____
O _____
T _____

TEAM MEMBER'S SWOT

NAME _____
S _____
W _____
O _____
T _____

TEAM MEMBER'S SWOT

NAME _____
S _____
W _____
O _____
T _____

TEAM MEMBER'S SWOT

NAME _____

S _____

W _____

O _____

T _____

TEAM MEMBER'S SWOT

NAME _____

S _____

W _____

O _____

T _____

DETAILED COMPANY SWOT

COMPANY S.W.O.T. STRENGTHS WEAKNESSES OPPORTUNITIES THREATS	
<p>Strengths</p> <ul style="list-style-type: none"> • What skills drive your company's passion? • What makes your company unique? • If you could choose one strength for your company to focus on every day, what would it be? 	<p>Opportunities</p> <ul style="list-style-type: none"> • What Opportunities would expand your company's growth? • What trends are you seeing? • What strengths can you use to turn these opportunities into reality?
<p>Threats</p> <ul style="list-style-type: none"> • What threats do you feel or envision internally and externally? • What threats do your company's weaknesses expose it to? • What conditions cause a threat? 	<p>Weaknesses</p> <ul style="list-style-type: none"> • What is your company not good at doing? • What decreases revenue? • What can you eliminate now from your company to make it stronger?

STRENGTHS

Strengths: Just like personal strengths we need to look at the company and understand what makes it stand out from the competition.

So for example, if all your competition provides the exact same product – let's say it's Auto Repair. The guy/girl down the street offers the same exact service and same types of cars serviced, let's say the prices are even the same – or very close. What strengths do you have over your competition?

What do you have that they don't?

Do It Now!



Let's look at some common questions you can ask to obtain your company strengths.

- What business processes are successful?

- What assets team asset do you have? Knowledge, education, networks, skills, reputation, etc?

- Is the culture of your company strong? Why or why not?

- Do employees embrace change? Why or why not?

- What assets do you have, ie; equipment, technology, cash, patents, loans, investors?

- What competitive advantages do you have over your competition?

- What do you do better than anyone else?

- What values drive your business?

- What unique or lowest-cost resources can you draw upon that others can't?

- Identify and analyze your organization's Unique Selling Proposition (USP). In other words – what do you do well that others want and is different from your competition?

LIST THE TOP 10 STRENGTHS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

PICK THE TOP THREE STRENGTHS THAT ARE IMPERATIVE TO MAKE YOUR COMPANY EVEN STRONGER IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.

WEAKNESSES

Now it's time to consider your organization's weaknesses. Be honest! A SWOT Analysis will only be valuable if you gather all the information you need. So, it's best to be realistic now.

Weaknesses can be found inherently within many areas of your organization. Focus on your people, resources, systems, and procedures. Think about what you could improve, and what tools do you have readily available to improve in these areas.

Do not look at Weaknesses as a negative, but instead as a positive. Once you uncover your weaknesses it will literally take a load off of you and your team's shoulders. You will then be able to easily see and focus on what your highest priorities are and what can be fixed and needs to be fixed now.

The great part about weaknesses is you are asking close to the same questions as the strengths – only focusing what needs to be improved.

Enjoy the ride!

Let’s look at some common questions you can ask to discover your company weaknesses. Once again – think outside the box! Build more questions along the way!

Do It Now!



- What business processes are not successful?

- What assets are missing in your team, such as knowledge, education, network, skills, and reputation?

- Is the culture of your company weak? Why?

- Are employees adverse to change? Why?

- What assets are missing, such as customers, equipment, technology, cash, and patents, loans, investors?

- What competitive disadvantages do you have?

- What do you do worse than anyone else?

- Why are the values not driving your business? What’s missing?

- What unique or lowest-cost resources are you missing out on that others can draw upon?

- Does your company have a Unique Selling Proposition (USP)? Is it strong enough? Does it make a big enough impact in your client's eyes?

Then turn your perspective around and ask yourself what your competitors might see as your weaknesses. What factors occur that keep your company from getting the sell?

Take time to examine how and why your competitors are doing better than you. What are you lacking?

LIST THE TOP 10 WEAKNESSES

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

PICK THE TOP THREE WEAKNESSES THAT ARE IMPERATIVE TO WORK ON IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.

OPPORTUNITIES

Opportunities are openings or chances for something positive to happen, but you'll need to see them for yourself!

They usually arise from situations outside your company and require a keen view as to what might happen in the future. They might arise as developments in the market, technology, pandemics or changing local or global outlooks.

Being able to spot and capitalize on these opportunities can make a huge difference to your company's ability to compete and take the lead in your market.

Think about good opportunities you can spot immediately. These don't need to be game-changers: even small advantages can increase your organization's competitiveness. What interesting market trends are you aware of, large or small, that could have an impact on the company?

Do It Now!



Opportunity is everywhere if you open your eyes to it and reach out to others in and out of your field of expertise. Along with the questions in the matrix, here are some questions to ask of your company:

- Is your business expanding with many opportunities?

- How is it expanding?

- Are there add-on products you could be offering or taking advantage of?

- Are there other companies you could partner with?

- Could your competitors have difficulty with adopting to a particular aspect of your market i.e., technology?

- Are there local or federal government regulations that could help to expand your business?

- Is there a client market you should be looking at?

Next, list the top ten opportunities that come top of mind. This is a great exercise to do with your team. It is amazing how many great ideas come about. When you open the floor to others within your company, you will be amazed at the ideas that will begin to flow. Think outside the box – no answer is a wrong answer. Budding thoughts are the perfect spot to develop creativity.

LIST THE TOP 10 OPPORTUNITIES

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

PICK THE TOP THREE OPPORTUNITIES THAT ARE IMPERATIVE TO WORK ON IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day. Develop one idea at a time and watch the change in the company!

THREATS

Threats include anything that can negatively affect you from the outside, such as a loss of a supply chain, shifts in market requirements, or a shortage of recruits or new or current clients.

It's vital to anticipate threats and to take action against them quickly. These can stall or stop growth or shut down your company.

Find out why they stop you and what can you do to move through these obstacles. You will find that help from someone else will build this weakness into a strength. Use your inner team to discuss and anticipate threats before they occur.

Now look closely at your strengths, is there a strength or several that you can use to combat the weaknesses?

What new solutions did you and your team come up within the opportunity section. You now have plenty of ammunition to defend against threats and turn them into a positive.

Do It Now!



Here are some questions to be asking:

- Clients – Do you have a broad number of clients in varying fields of business? The more diverse your client base the safer your company. If not, how can you change this?

- Qualified Employees – Are you having difficulty finding the right level of employee for the job to be done i.e., education, certifications, license, etc. If so – see what your competitors are doing? What can you do now to ensure a funnel of applicants at all times?

- Loss of supply chain – do you have more than one supply chain. ALWAYS have a plan B. If you do not, this will not only stop your business, but your cost of doing business will be dictated by the high cost of your supplier.

- Shift of market or business – always be looking into the future – 6 months, 1 year, 2 years etc. Will you be in business 10 years from now? What will that look like? Prepare now for the future.

- Evolving technology – how can you use this to your advantage. Do not overpay for technology – always spend wisely with a vendor that will be looking to the future with you. Or bring the technology in house if it is not too costly.

- Are you having cash flow problems – look for long term solutions.

List the top ten threats.

You will want to get all departments involved in this process to ensure you can work on this as a company. The more internal involvement the better. Make sure, as you look at the threat, have all involved and come up with a potential solution. We want all ideas on the table. This is a perfect brainstorming situation. Strengthen your culture through involvement.

TOP 10 THREATS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

PICK THE TOP THREE THREATS THAT ARE IMPERATIVE TO WORK ON IMMEDIATELY. CIRCLE OR HIGHLIGHT THEM NOW.

Make sure to go to the SWOT Matrix and write down the one area you would like to focus on every day.

S.W.O.T – Company

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p>Strengths</p> <ul style="list-style-type: none"> • What skills drive your company’s passion? • What makes your company unique? • If you could choose one strength for your company to focus on every day, what would it be? 		<p>Opportunities</p> <ul style="list-style-type: none"> • What Opportunities would expand your company’s growth? • What trends are you seeing? • What strengths can you use to turn these opportunities into reality? 	
<p>Threats</p> <ul style="list-style-type: none"> • What threats do you feel or envision internally and externally? • What threats do your company’s weaknesses expose it to? • What conditions cause a threat? 		<p>Weaknesses</p> <ul style="list-style-type: none"> • What is your company not good at doing? • What decreases revenue? • What can you eliminate now from your company to make it stronger? 	

COMPANY SWOT

S _____
W _____
O _____
T _____

REGIONAL SWOT

S _____
W _____
O _____
T _____

YOUR TEAM SWOT

S _____
W _____
O _____
T _____

ADDITIONAL NOTES:

S.M.A.R.T. Goal Setting - DEFINITIONS

Look at each goal and evaluate it. Make any changes necessary to ensure it meets the criteria for a SMART goals:

- S = Specific
- M = Measurable
- A = Attainable/Motivational
- R = Realistic
- T = Timely

S - SPECIFIC

Goals should be straightforward and emphasize what you want to happen. Specifics help us to focus our efforts and clearly define what we are going to do.

Specific is the Who, What, Why, and How of the SMART model.

What tools do you have in your Toolbox? What tools can you and your team use to increase the value of this goal. By providing tools for your staff and yourself you will find that the goal is easy to achieve. Many times we don't realize what we already have in front of us to reach a goal.

- WHO or WHAT tools do you have available to make this goal come alive!
- WHAT are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, create, build etc.
- WHY is this important to do at this time?
- What do you want to ultimately accomplish?
- HOW are you going to do it? (By...)

Ensure the goals you set are very specific, clear and easy to understand.

M - MEASURABLE

If you can't measure it, you can't manage it.

Choose a goal with measurable progress, so you can see the change occur. How will you see when you reach your goal? Be specific!

Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued success in reaching your goals.

A – ATTAINABLE/MOTIVATIONAL

When you identify goals that are the most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, and skills, to reach them. You begin seeing previously overlooked opportunities to bring yourself closer to the achievement of your goals.

If you set goals that are too far out of your reach, you probably won't commit to doing them. Although you may start with the best of intentions, the knowledge that it's too much for you means your subconscious will keep reminding you of this fact and it will stop you from even giving it your best.

A goal needs to stretch you slightly so you feel you can do it and it will need a real commitment from you. The feeling of success which this brings helps you to remain motivated.

Write down What motivates you? What motivates your staff? Is the goal in the near future? How will you integrate motivation and passion into this goal? Who can you connect with to ensure the goal is attainable?

R - REALISTIC

This is not the same as "easy". Realistic, in this case, means "do-able". It means that the learning curve is not a vertical slope; that the skills needed to do the work are available.

Devise a plan that makes the goal realistic. The goal needs to be realistic for you and your team – now. Where you are in the moment.

Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too low of an expectation sends the message that you or your team are not very capable. Set the bar high enough for a great achievement!

T -TIMELY

Set a timeframe for the goal. Putting an end point on your goal gives you a clear target to work towards.

If you don't set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time limit, there's no urgency to start taking action now.

Time must be measurable, attainable and realistic.

Everyone will benefit from goals and objectives if they are SMART. SMART, is the instrument to apply in setting your goals and objectives NOW.

SMART GOALS WORKSHEET

Today's Date

Start Date

Completion Date

Employee Name

Job Title

Date of Hire

Goal

Verify that your goal is SMART.

S - SPECIFIC. What tools do you have in your Toolbox? What tools can you and your team use to increase the value of this goal. By providing tools to your staff and to yourself you will find that the goal is easy to achieve. Many times we don't realize what we already have in front of us to reach a goal.

- WHO or WHAT tools do you have available to make this goal come alive!

- WHAT are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, create, build etc.

- WHY is this important to do at this time?

- What do you want to ultimately accomplish?

- HOW are you going to do it? (By...)

M - MEASURABLE. How will you know when you have reached this goal? Choose a goal with measurable progress, so you can see the change occur. How will you see when you reach your goal? Be specific!

Establish concrete criteria for measuring progress toward the attainment of each goal you set.

A - ATTAINABLE/MOTIVATIONAL. Is the goal realistic with effort and commitment? Write down - What motivates you? What motivates your staff? Is the goal in the near future? How will you integrate motivation and passion into this goal? Who can you connect with to ensure goal is attainable?

R - REALISTIC. Devise a plan that makes the goal realistic. The goal needs to be realistic for you and your team – now. Where you are at in the moment.

Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too low sends the message that you or your team are not very capable. Set the bar high enough for a great achievement!

T - TIMELY. When will this goal be achieved? Set a timeframe for the goal: Putting an end point on your goal gives you a clear target to work towards.

If you don't set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time limit, there's no urgency to start taking action now.

DATE TO BEGIN: _____

CHECK IN DATES AND STEPS: _____

DATE TO COMPLETE: _____

WHAT DOES YOUR COMPLETED SMART GOAL LOOK LIKE?

HOW DOES IT MAKE YOU FEEL?

WHAT HAPPENS NEXT?

THE SHIFT

DAILY ACCOUNTABILITY WORKSHEET

Accountability means living every day to your fullest. As you go through your day, you will see success along the way. Pure focus = Success! Enjoy the ride of your life!

Employee Name: _____

Date: _____

TOP THREE MONTHLY GOALS	TOP THREE MONTHLY KPIs
1.	
2.	
3.	

BREAKDOWN GOALS WEEKLY	BREAKDOWN KPIs WEEKLY
1.	
2.	
3.	

BREAKDOWN GOALS DAILY	BREAKDOWN KPIs DAILY
1.	
2.	
3.	



BEGINNING OF SHIFT CHECK IN:

WHAT WILL YOU DO AT THE BEGINNING OF THE SHIFT TO REACH YOUR GOALS?	WHAT WILL YOU DO AT THE BEGINNING OF THE SHIFT TO REACH YOUR KPIS?
1.	
2.	
3.	



MIDSHIFT CHECK IN:

WERE YOUR GOALS ACHIEVED? IF NOT WHY? WHAT CAN YOU DO DIFFERENT FOR THE SECOND HALF OF THE SHIFT?	WERE YOUR KPIS ACHIEVED? IF NOT WHY? WHAT CAN YOU DO DIFFERENT FOR THE SECOND HALF OF THE SHIFT?
1.	
2.	
3.	



END OF SHIFT CHECK IN:

WERE YOUR GOALS ACHIEVED? IF NOT WHY? WHAT CAN YOU DO DIFFERENT FOR THE NEXT SHIFT?	WERE YOUR KPIS ACHIEVED? IF NOT WHY? WHAT CAN YOU DO DIFFERENT FOR THE NEXT SHIFT?
1.	
2.	

3.	
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SET YOUR GOALS FOR THE NEXT SHIFT YOU ARE ON:	SET YOUR KPIs FOR THE NEXT SHIFT YOU ARE ON:
1.	
2.	
3.	

REPORT TO THE NEXT SHIFT YOUR OUTCOMES AND WHAT YOU DID TO ACHIEVE YOUR GOALS. WHAT WORKED? WHAT DID NOT WORK?	REPORT TO THE NEXT SHIFT YOUR OUTCOMES AND WHAT YOU DID TO ACHIEVE YOUR KPIs. WHAT WORKED? WHAT DID NOT WORK?
1.	
2.	
3.	

Special Notes or Shout Outs of achievements!

KEY PERFORMANCE INDICATORS

A key performance indicator (KPI) is a value measured within the company to identify the success of a company. The value that is absolutely necessary to the success of the company's existence and growth. KPIs are internal values not external, therefore you have full control over them.

A great KPI acts as a compass that shows if you are on the right path to your goals.

Review the list of examples of KPIs below. Before you choose your KPIs make sure to ask the following questions about each KPI you are considering:

- Can it be easily quantified

- Are we able to influence/drive change using this KPI, or is it out of your control?

- Does this KPI connect to you and the company's objective as well as overall strategy?

- Is it simple to define and understand?

- Can it be measured?

- Will it still be relevant in the future?

If the answer is "no" to a number of these questions, it may be a sign that the KPI either needs to be altered or replaced.

I would like you to think of what the top three KPIs are for your team in each category. Base these upon the KPIs set by your company. If your company has not set KPIs, do this now. Just as with the goals, it's important to know what management and the company as a whole are striving to achieve.

The list below is just a small example of over a hundred KPIs you might be looking at. It's ok to choose other KPIs. Circle the top three in each category that will provide the focus and outcome you desire.

Some of the KPIs may not pertain to you and your team. That's OK choose the categories that you and your team can influence.

Always remember – what’s important is the final outcome. Will tracking this KPI get the results you are looking for.

Start each KPI with a benchmark number (what has already happened, or the end result you want to achieve if no benchmark data is available). Then set your goals for each key area to improve results. Which Key Indicators make the biggest difference in reaching your goal(s). Pick three areas to focus on in each category and improve results. Make sure to track results daily to ensure you reach your end goal(s).

Examples of Sales KPIs

1. Number of New Contracts Signed Per Period
2. Dollar Value for New Contracts Signed Per Period
3. Number of Engaged Qualified Leads in Sales Funnel
4. Hours of Resources Spent on Sales Follow Up
5. Average Time for Conversion
6. Net Sales – Dollar or Percentage Growth
7. Year-over-Year Production increase

Examples of Financial KPIs

1. Growth in Revenue
2. Net Profit Margin
3. Gross Profit Margin
4. Operational Cash Flow
5. Current Accounts Receivables
6. Inventory Turnover
7. EBITDA (Earnings Before Interest, Taxes, Depreciation and Amortization)
8. Year-over-Year

Examples of Customer KPIs

1. Number of Customers Retained
2. Percentage of Market Share
3. Net Promotor Score
4. Average Ticket/Support Resolution Time
5. Year-over-Year Customer Retention

Examples of Operational KPIs

1. Order Fulfillment Time
2. Time to Market
3. Employee Satisfaction Rating
4. Employee Churn Rate
5. Year-over-Year Employee Retention

Examples of Marketing KPIs

1. Monthly Website Traffic
2. Number of Qualified Leads
3. Conversion Rate for Call-To-Action Content
4. Keywords in Top 10 Search Engine Results
5. Blog Articles Published This Month
6. E-Books Published This Month
7. Number of YouTube Videos Produced

Now that you have circled your top three in the categories that pertain to you, write them in the section below and use the Goal worksheet to ensure you have a solid plan to move forward.

It does not do any good to just circle and be aware of KPIs, you must put together an action plan to ensure you obtain the results you want.

This is where your S.M.A.R.T. goal worksheets come into play. It's important to make sure your goals are Specific, Measurable, Attainable, Realistic and Timely.

KPIs SALES Top three	What does your S.M.A.R.T goal look like to achieve this KPI? Go back to the Goal setting course. Fill out S.M.A.R.T. goal worksheet for each.

KPIs FINANCIAL Top three	What does your S.M.A.R.T goal look like to achieve this KPI? Go back to the Goal setting course. Fill out S.M.A.R.T. goal worksheet for each.

KPIs CUSTOMER SERVICE Top three	What does your S.M.A.R.T goal look like to achieve this KPI? Go back to the Goal setting course. Fill out S.M.A.R.T. goal worksheet for each.

KPIs OPERATIONS Top three	What does your S.M.A.R.T goal look like to achieve this KPI? Go back to the Goal setting course. Fill out S.M.A.R.T. goal worksheet for each.

KPIs MARKETING Top three	What does your S.M.A.R.T goal look like to achieve this KPI? Go back to the Goal setting course. Fill out S.M.A.R.T. goal worksheet for each.

What are your Leading Indicators? Focus on the top three.

1. _____
2. _____
3. _____

First do the following before deciding on your leading indicators:

1. DEFINE the business goals and results you want to achieve
 - By developing your goals first, it helps you to start with your strategy and identify what it is you want to achieve.
2. DEFINE measures for your goals and results
 - Once you are clear about what you want to achieve, you want to have measures in place to track your outcomes or results. That's also the beauty of S.M.A.R.T goals - you know where you're going with measurable outcomes. You know where you have been and where are you going.
 - You want to make sure to continually review the past and how you can affect the future.
3. DEFINE your Lagging and Leading indicators.
 - This is the step where you will define your leading indicators by identifying how you will measure your KPIs. These can be a measured based upon history or placement of first time KPIs and clearly defining what activities performed every day will achieve those goals.
4. It's important to monitor every day and in every way. Discover how to improve daily to increase efficiencies.

Lastly make sure to continue to monitor your KPIs. As you review your KPIs note the steps below. You will want to follow these steps to ensure you are focused on your KPIs and that you are putting a solid plan into place to continually improve upon them.

Bring this path to life by utilizing the Goal sheet. Make your plan S.M.A.R.T. You'll find vast improvement will occur quickly!

So what happens next? Once your KPIs are established and you have built your S.M.A.R.T. goals around them, your next step is to review each KPI and start to measure its success.

Step 1 is to see which Lagging Indicator needs to be improved.

Step 2 Once you have identified the Lagging Indicator identify how you will measure what success means? Measurement is a critical step to any goal or KPI. Tracking these results day in and day out is what will make the difference.

Step 3 Next – what will you be doing differently to obtain this success. Again – stick to your Power of three. Please do not change more than three things at a time. You need to identify what is making the biggest impact on the KPI and focus in on that change. I highly recommend ONLY changing one thing at a time. This will give you the clearest picture of what is impacting your goal.

Step 4 Lastly how do you ensure consistent improvement?

...Believe it or not, this is the simple part, but only if you change habits and stay consistent with the new process. Consistency means tracking and helping to change habits to function differently than before.

Problem Step 1	<ul style="list-style-type: none">• What is the Lagging KPI we are improving?
Goal Step 2	<ul style="list-style-type: none">• How do we measure the new results?
Change Step 3	<ul style="list-style-type: none">• What do we need to do different?
Follow Through Step 4	<ul style="list-style-type: none">• How do we ensure consistent improvement?