COMPANY GOAL-SETTING PROCESS

Pre-Work

1. **Mission, Vision & Values**
    a. Ensure Mission/Vision & Differentiated Values are up to date and in 1-Page Strategic Plan document

2. **Define Strategic Objectives (2–3 Years Out)**
    a. Meet with executive team to discuss strategic objectives for next 2–3 years
        i. Discuss the <u>10 strategy questions</u>
        ii. Consider all 6 areas of the business
    b. CEO refines ideas into strategic objectives and places them in 1-Page Strategic Plan document
    c. 1-Page Strategic Plan document shared with entire team

Week Before Q1 Start

3. **Define Company Goals (90 Days Out)**
    a. Before start of quarter, meet with executive team to define company goals
        i. Consider all 6 areas of the business
        ii. Ask: "Are the goals achievable? Do they create business value?"
    b. CEO refines ideas into 5–7 goals and places them in CEO-S Software or other tool
    c. Company goals shared with entire team

During Q1

4. **Upkeep**
    a. Weekly executive team meeting to check in on the 5–7 company goals
        i. Ask "How likely are we to achieve this goal on time?"
        ii. Ask "How do we feel about the quality of the work done on this goal?"
        iii. Mark each goal's health: Red-Yellow-Green

Week Before Q2 Start

5. **Reset**
    a. Mark goals *Achieved* or *Not Achieved* at end of quarter
        i. Goal outcomes inform goal-setting process for next quarter
    b. Revise strategic objectives (2–3 years), updating based on progress made
    c. Create 5–7 new company goals for next quarter using same process