

Goals Day: Selling, Setting Up and Facilitating

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Selling the Goals Day

The Goals Day is often a first step with a new client. While we suggest that ideally the first step should be creation of the Vision and Purpose (see *Selling the Vision and Purpose*), in many cases your client cannot see the need for a Vision but gets very excited about having a Goals Day. This is particularly true for client organizations concerned about creating a clear direction and unity of purpose among team members. The Goals Day, as a rule, shows quick results as compared to the rather difficult task of putting together a Vision. If the client seems skeptical, unsure of you, or unwilling to follow your directions, a Goals Day may be preferable to a Visions Day as a first step.

The Goals Day creates a long-lasting feeling of unity in the organization through focusing on the identified goals. Employees become excited about the future of the organization and the role they can play. Hundreds of creative ideas for company goals are expressed. Employee concerns and suggestions that your clients never imagined come out. The Goals Day dramatically increases the feeling of teamwork within the organization, and it becomes the premier annual event for any organization.

To sell a Goals Day, you need to be very enthusiastic about it. Refer to other clients who have done it. Explain that clearly defined goals will help all their people go in the same direction, "creating a real feeling of teamwork." Because of your enthusiasm and faith, and because usually your clients really want to improve the feeling of unity within the organization, they tend to sign up quickly for the Goals Day.

The Goals Day Process

Billable amounts for a full fledged Goals Day process can be as low as \$250 or as high as \$7,000. A lot of this depends on how many hours are spent gathering input from people before the Goals Day. For a larger, well financed company you can meet with participants individually to help them fill out the Goals handouts. To save money you can work with groups of three to eight people rather than individually.

To start, you work with your clients to select Goals Day participants. For organizations of eighteen or less it is best to include everyone. For organizations of a hundred or more, you can either pick out ten to fifteen key people, or you can gain input from all team members via group meetings.

In some cases it is a good idea to give a short presentation ahead of time describing what is going to happen at the Goals Day. This can be particularly helpful in large organizations where the politics and shared power issues are more intense than in small organizations. Each person then receives a copy of the Organizational Goal Setting handout. Here, each participant writes down ideas on such issues as organizational strengths and weaknesses, a personal vision of the company's future during the next five years, dreams for the organization, areas that need change, and top goals for the company.

A Goals Day produces a catharsis through bringing out concerns, fears, anger, and other negative emotions. You will want to encourage all of this emotion, allowing people to express despair about the company and its management. For the management, this is a wake up call, a slap in the face to help them become aware of real problems within the organization. There is a strong positive dark side to this process.

The Organizational Goal Setting handout is the standard form we use for a first Goals Day. For subsequent Goals Days we have a database of additional questions that can be used. (See Goals Days, An Annual Event). The reason to use a different handout for the subsequent Goals days is that the first Goals Day tends to hit the most pressing, key problems. Later Goals Days tend to focus on more specific issues, particularly those concerning the implementation and refining of goals already identified.

Scheduling Meetings

First, you will need to block out enough time to work with participants in completing the handout. As we mentioned, some of this can be done one-on-

one if the organization can afford it. In other cases you will have small group meetings to get the job done. (If your client has a really tight budget, you can hold a Goals Day with direct brainstorming of goals during a one- to two-hour session without any advance meetings. This is not as effective, but it does get the job done.)

Once meeting times have been blocked out, tell your client to distribute the handouts and assign a deadline for completion. Explain that it is expected some people will not complete the handouts. That is the purpose of scheduling meetings to work on the handout. There is a strong reality here that you need to explain to your client: this is the first time most people have ever done this type of thing and it is too much to expect them to do it adequately on their own.

With your client, schedule the group or individual meetings, preparation time for the Goals Day, and the Goals Day itself. The Goals Day preparation meeting(s) should include your client and other key leaders. You will prepare the speeches and the agenda at this time. Make sure that all scheduled dates are listed in your client's calendar and your own.

The Goals Day itself can be scheduled in the evening from 5:30-10:00 p.m. Other popular times are Fridays from 12:00-5:00 p.m. or 7:00 a.m. - 12:00 noon, and Saturdays are also popular. The ideal Goals Day is five-six hours long. You can do it in three to four hours; it will be rushed but still effective. Let your client decide on the place. It should be a private, self-contained location with the ability to provide food service. An outside location such as a restaurant or hotel conference space, any other place with adequate privacy, is good. The Goals Day can be held at the company if the facilities are adequate, but it is better to hold the Goals Day elsewhere to eliminate interruptions.

To summarize, there are three groups of meetings to set:

1. Goals handout completion, one-on-one or in groups
2. Goals Day prep appointment, with top leadership
3. The Goals Day itself

With a larger or a more liquid company you can spend many billable hours on speeches and preparation.

Completing the Goals Handouts

Individual Meetings

The individual meeting allows for each team member to have 45 minutes to an hour with you to complete the entire handout. Adjust your approach to the individual's personality. For example:

High excitement - tons of ideas: Allow this type of person to follow the golden thread of ideas and encourage them to go deep into the implementation. This person tends to come with the complete handout filled in. Encourage them to expand on ideas they feel very emotional about. Have them write on the back side with "over" on the front if they need more space. Make note of these folks, for you can call on them to keep the Goals Day exciting.

Low excitement - few ideas: This person is a wonderful challenge. "I can't think of anything," is their standard response. Ask for one or two top challenges or dreams, and then ask an in-depth question using silence. They might say one challenge is "communication". Ask "What things need to be better communicated?" The individual might respond, "What is expected." This is a valuable response; it and any other good response should be written on the handout by the participant. Build emotion by asking "Why is this important?" Have them write every response they give you and before you know it you have got a paragraph!! You have also sparked a part of the brain that cannot stop giving ideas. The person tends to be proud of the ideas they have put down en masse, but many times will complain you gave them a headache. Allow silence to be your greatest tool. One consultant uses the phrase, "Write that down," whenever an idea is mentioned. (For more information on this process, see *How To Be A Goals Coach*.)

Group Interview

The group interview (without your client being present) allows you to fire up many minds at once, creating a mastermind effect where ideas pop out from nowhere. It does not give as much focus on the individual but it produces a lot of good ideas nonetheless. As you start a group interview make note of how many handouts are adequately filled out. You may need to give the participants 5-10 minutes of quiet time to complete the handouts before you begin with the program. Have each participant, one at a time, read the answers to the first page of the handout.

Within a group interview, you can do two things to get more information: First, you can stop the person midstream in a key point and ask "Why is that

important?" After hearing the answer, instruct the person write it down, allowing enough time for this. Then ask the same person to continue. Alternatively, you can have a person read the whole page of the questionnaire, then ask "What key things do you feel strongly about?" And then ask "Why is that important?"

The whole goal here is to uncover the emotional core and capture it on paper. In particular, you need to encourage people to write down shocking and controversial items such as "The boss does not care at all about us," "John loses his temper too much," "Profit sharing," "No input from the employee," "People fighting." This is the reality that needs to be recorded. In addition to collecting information, this exercise builds faith in team members that they can bring up controversial items without being fired.

In the group there will be one or two very negative people who feel that the company or owners have wronged them. These people are bitter, angry, and quickly disruptive. You must at this time honor their anger, asking them to write down all the negative things they can think of. Encourage them by saying "What else, tell it all." This allows for a beginning of catharsis. It is hoped that as the organizational change process occurs, this person will align him- or herself to the company and work toward positive change. If we truly walk our talk we will recognize what a gift the negative person can give the organization. Rebels, by virtue of their personalities, often reveal the truth. We do not want the sickness of "only thinking positive" in our organization. This is like admiring the emperor's beautiful new clothes because no one has the courage to say that he is naked. Negative, rebellious employees provide more useful information than brainless positive-thinking followers. Encourage the participants to write down all negative ideas, anger, and feelings. This is where the wealth is to be found.

As you go through this process, you are going to discover the emotional truth that exists within the organization. If ideas are coming that could cause your client to go on the defensive, here is what to do: Approach your client and very seriously, in a grave tone, say, "It is going to be important that you show no anger toward the ideas being shared. You must show your team members that you are open to their concerns. If you do not do this, trust will be abolished. Do you understand?" Emphasize this point again and again. This has strong positive darkside results that catch an owner's attention. Explain that it is very important for the owner or manager to show the face of the leader.

What you are doing at this point is using the Lewin Change Model. You are unfreezing the organization, thawing it into the chaos of possibilities. Then, with new systems installed, you are re-freezing at a higher level, and at that point turning it back to your client. While unfrozen, you are in charge of the company's future. This is a key to being a successful change agent. If you fail in your role here the organization can be left in chaos and despair. That is why it is imperative that you maintain an aggressive focus in keeping the organization aligned to the future.

Once the goals handout is completed, make two copies of each team member's handout, one for yourself and one for your client. Bring these copies to the Goals Day, since most clients forget them.

Goals Day Prep

At the Goals Day prep meeting you need to set up the agenda with your clients as well as help them work on their speeches. In some cases, you may decide not to have speeches due to time concerns, or the intense shyness of your client. In most cases, having the leaders speak can be very progressive to the Goals Day.

The President/Owner generally gives the State of the Union speech. Other speeches should be aligned with the way the company is organized. Suggested speeches include:

1. **State of Marketing**
2. **State of Service**
3. **State of the Office**

A history of the company is also a good topic. We have prepared speeches that can be adapted for use in a Goals Day.

If the budget permits, a large number of hours can be spent working on the speeches with the presenters. Many leaders feel that this is a major statement and they want help preparing. Take all the time they wish.

Once the agenda has been set, arrange to have copies prepared to be brought to the Goals Day.

Set-up for The Goals Day

Bring to the Goals Day:

1. Copies of the Company Vision Statement
2. Marker board and markers with easel
3. Roll of masking tape
4. Index cards
5. Marker pens for index cards
6. Goals Day speech notes

Distribute the index cards (hundreds of them) and markers around the tables where participants will sit. Set up the marker board with the message, "Welcome Company XYZ, Goals Day '98".

THE GOALS DAY

Here are some suggestions for running a successful Goals Day.

Facilitating

As a Goals Day facilitator, you are the main time captain. Things can be easily cut off or expanded on to fit the time limits. For example, if you are only given three hours for a Goals Day and breakfast is first, give the speeches during breakfast and go right into reading the goals handout as soon as breakfast is finished. To speed things up, simply ask fewer questions about the ideas. Allow people only to read what they have written, without additional comments.

Creating an Atmosphere of Excitement

A key to success and an exciting Goals Day is enthusiasm. A great tool for building enthusiasm is clapping. From the first speech on, have people applaud the speakers. Any good ideas should be applauded. The office (the center of great mother energy) should be applauded. An older worker should be applauded. Get people in the habit of clapping on cue. This continues to other meetings and the next Goals Day. Hey, they use clapping on the game shows and sitcoms - why not at the Goals Day?

Intuitively feel the rise of enthusiasm and electricity among the members of the group. As Emerson says, people become possessed with the feeling of enthusiasm. Note who is excited and build on their excitement. Allow it to electrify others. As Napoleon Hill pointed out, each mind is a receiving and

transmitting station to the other minds. When the mind heats up new ideas pop out at amazing speed. This is the true mastermind in action. Your role is to help the team capture all important ideas, using these urgent words: "Write that down". Unless we honor all ideas, the flow may cease.

The Agenda

Distribute copies of the Agenda.

You will usually begin with formal introductions and speeches.

Once the speeches are done have each person pick up a stack of index cards and a marker. At this point, talk excitedly about the mastermind effect, that "ideas will pop out of nowhere and every idea should be captured on these cards!" Emphasize again and again that they should write one idea per card. Make sure people know that it does not matter if everyone writes down the same idea. This simply means the idea is significant and will gain more attention when we decide the top goals. You must check to make sure each team member writes down ideas. Some will capture ten times more ideas than others, but everyone must write something. Get real hyped about this. The only purpose for this meeting is to capture all the goals that come out. Sometimes you will have to force someone to write down some items and that is OK.

In a 5-6 hour Goals Day, you will gain a majority of the ideas and concerns in the first 3 hours. You will find that the change exercise gives you a huge number of key concerns. In this phase (the first 2-3 hours) you are intense in your question asking, intense in your emotion. The goal in the first 2-3 hours is to find out the very top concerns and get them all down on cards, to dig for the cure. In the first 2 hours, 80% of the top goals will come out. The last 3-4 hours you will search for the other 20%.

The mastermind effect quickly sorts out the clearly defined path of the organization for the next 12 months. It burns it into the psyche of most everyone there. The giant mind of one consisting of all the minds now clearly sees the direction the organization will go. Thus hundreds of goals have been identified and now the team can fly in formation.

On a mystical level you are the grand wizard dealing with powers unseen. Like Mickey Mouse in Fantasia, you hold the magic wand and wear the

magic robe. It is as if the organization transforms itself before your eyes. A new truth has been spoken and all have heard. The catharsis has occurred.

The Goals Day is a ritual event. The Goals Day fully connects the group to infinite intelligence. The Goals Day honors all powers unseen. We are bound by spiritual powers that execute themselves. Honor whatever forces you honor as you go through this event.

At the End

At the end of the Goals Day, gather up all the cards. It is helpful to do some general prioritizing. The best way to do this is to have each participant pick out 2-3 goals that they feel are the most important. Have them sell the group on why they feel these goals should be in the top ten. Then put these goals up on a board and vote with fingers:

1. highest
2. medium hot
3. in-between
4. cold
5. hate, do not want to have happen

This quickly separates the goals and creates a prioritized list to be used immediately. At end of one Goals Day, the client commented, "After seven years, we finally have a clear direction for our company."

Gather the cards and either you or your client, or both of you together, sort them out into sub-categories to be placed under the prioritized goals. Have the goals typed up with their categories.

The Goals Day has come to an end.

Follow-up to the Goals Day

Once the goals are typed, review them with the client in order to get them more clearly defined and prioritized. You now have a great wealth of items to focus on for the next 12 months. The alignment of you, as a consultant, and the company has taken place. You are now ready to show your implementation skills. The goals created in the Goals Day may result in some quick changes. People may quit or be fired since now the expectations

are clear. Do not be alarmed if this happens. Once the goals are clear, certain people may not feel aligned to the organization.

In general of all goals identified in the Goals Day, 80% are low cost. These goals are systematic changes that have little or no monetary cost, but dramatically help the organization. Work on these goals for quick victories. This encourages everyone.

Arrange to meet at least bi-weekly with your client and company leaders to work on the goals. At this point, a time management class or leadership class may be needed. Suggest this if the company can afford it. Do not let bad leadership or time management skills undermine the faith in the goal setting system. The implementation phase is crucial, as expectations of improvement have been raised and must be met. A good Goals Day will provide you with significant billable work for the next twelve months. The client will be excited about the goals, and willing to make the investment to make them happen.

This is where you bring in your associates from your computer division, policy and procedures analysts, ISO-9000, etc. as needed. This expands billable hours for others in your organization, and expands your own earning potential, while implementing the goals of your client.

Make sure to promote Goals Day as an annual event. It is OK to schedule the next Goals Day well in advance. By doing this, you are encouraging an on-going process of improvement that never ends.

The Goals Day is the centerpiece of your consulting strategy. It not only provides significant billable work, but gives birth to new billable opportunities in many directions.

Other suggested readings:

- How to be a Goals Coach
- Selling the Vision and Purpose
- Goals Days, An Annual Event
- Sample handouts, forms, materials
- Organizational Goal Setting handout