

PERSONNEL

Do You See What I See?

Sharing your company's vision with your team is imperative for success.

Gina Pellegrini

Are you clear about where you're headed in your business? By that I mean do you have a concrete, workable plan for the future of your company? If so, is your team involved in your vision? It's important to look at where you're headed in your business (the vision), how you expect to get there (the game plan) and what the team hopes to achieve (the results).

Developing a game plan is the central part of business planning. Basically, it's your road map to the future. To reach your goals, you need vision, and to achieve your vision, you need teamwork. I'm surprised how often employees are left out of the company vision. By company vision, I mean a three- to five-year plan, not a one-year initiative. You may think it's unnecessary to include the staff, but remember it's their future, too! When they buy in, your options are endless.

Begin with yourself

Put your current team aside for a minute and answer these questions. In three years, what do you see for your revenue, number of clients, criteria for new clients, number and type of appointments per week and annual fees? To achieve your three-year vision, who is on the team? How many employees do you need? What are their skill sets, compensation packages, required licenses and benefits?

Review your answers and apply them to your current team. How do they fit into your vision? What are your employees' professional goals? What are their

income objectives? Do you know the answers to these questions?

Most business owners are hard-pressed to describe their ideal team three years from now. Although they set goals, one year at a time, few owners see the big picture. They think about what is needed to achieve their goals, but not who is needed. They often lose staff because they don't explain their long-term vision, and employees don't see where or how they fit into the company's future. Staff turnover can upset consistency and strategic planning in the office. As a result, one-year plans are hard to achieve and three-year plans are hard to imagine.

"Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world."

—Joel A. Barker

Involve your staff

Get your team involved! As you begin planning for next year, schedule times to


meet as a team. Start with the bigger picture: three years from today. Once you know where you're headed, back up and get specific about the current year. Identify who does what, clarify your expectations and build accountability.

How do you hold people accountable? By scheduling weekly meetings. A weekly meeting is the best way to keep everyone involved; it also helps with momentum. If you get off track during the year, use the weekly meeting to figure out what's not working. Brainstorm to find solutions and get back on course. The meeting agenda should include these items:

- a review of the previous week
- the focus for the current week
- a review of open business
- accountability for specific activities (referrals, appointment scheduling, continuing education, etc.)
- update of appointment calendar
- prioritization of workflow

The meeting should take about an hour and will be energizing if you stay focused. (By the way, it's not the time or place for delegation. See my article in the August issue—that's a totally different system.)

Create your vision, include your team, get their input and build accountability. Don't be afraid to try new things. As someone once said, "If you always do what you always did, you'll always get what you always got."

See you next month when I discuss "business SPF." 

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SHARING YOUR VISION

DO:

- Explain to staff where you want to go with the business
- Break down your vision into action steps (a game plan)
- Schedule meetings to hold staff accountable for action steps and progress

DON'T:

- Expect your staff to read your mind
- Be unrealistic about the company vision
- Skip out on team meetings