

### Blueprints for Managers

Is a unique and comprehensive approach to help develop managers and supervisors. Providing the foundation, strategies, and tactics to better manage and lead their employees.

### Foundational Blueprints

In leadership, your belief system, attitudes, perceptions, and past experiences have a direct affect on how you lead others. Your Foundational Blueprints are areas to learn and grow, developing a strong leadership base or foundation to stand throughout your career.

### Strategic Blueprints

In management, strategy is the thinking process required to plan a change, or to organize something. What are the cause and effects of your management decisions? Strategic Blueprints are vital to the long term success of your organization and career.

### Tactical Blueprints

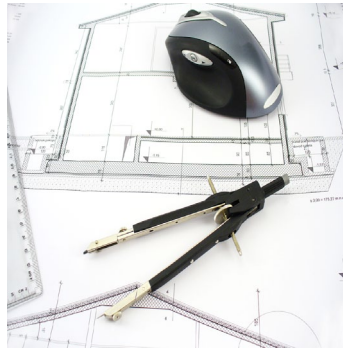
In management and leadership, Tactical Blueprints are the "who, when and where outlines" for obtaining your strategic goals. Managers need tactical plans to measure their successes.



# Blueprints

## FOR MANAGERS

## 11B - Strategic Planning and Goal Setting



- **Five Step Goal Setting Formula**
- **Ten Step Formula for Effective Planning**
- **Discover ways to gain employee involvement and commitment to planning**

### WHAT OTHERS HAVE TO SAY ABOUT PLANNING AND GOAL SETTING

*"Failing to plan is planning to fail."*

*Alan Lakein*

*"Never look back unless you are planning to go that way."*

*Henry David Thoreau*

*"Plans are nothing; planning is everything."*

*President Dwight D. Eisenhower*





## Session Learning Goals

- 1) Five Step Goal Setting Formula
- 2) Ten Step Formula for Effective Planning
- 3) Discover ways to gain employee involvement and commitment to planning

## Session Opener - Foundational Ideas:

Think of a tough, important goal in your past that you didn't achieve. Why did you fail to achieve this goal? Share your answers in small groups, and then discuss some of the major factors that keep people from achieving their goals.

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## Why a Planning and Goal Setting Program?

1. A goals program will move you from survival to stability, from stability to success, from success to \_\_\_\_\_ (a).
2. You must keep the main thing, the main thing - a balanced life is the main thing.
3. Everyone wants to be or have: Happy, Healthy, Prosperous, Secure, Friends, Peace of Mind, Good family relationships, Hope, Love/Be Loved.
4. The areas of a balanced life are: Personal, Family, Career, Financial, Spiritual, Mental and Physical.
5. Run your day by the clock & your life with a \_\_\_\_\_ (b).
6. You were born to win. But in order to be the winner you were born to be you've got to plan to win. You've got to prepare to win. And then and only then can you legitimately expect to win.

### Five Step Personal Goal Planning Blueprint

**Step I** On a clean sheet of paper, write your "dream list and wild ideas". Let your imagination run wild and print everything you want to be, do or have.

**Step II** Wait 24-48 hours then answer the question "why" for each item you have printed on your dream sheet.

**Step III** Ask these 5 questions, all of which have a "yes" answer:

- 1) Is this really my goal?
- 2) Is it morally right and fair to everyone concerned?
- 3) Is it consistent with my other goals?
- 4) Can I emotionally commit myself to finish this goal?
- 5) Can I "see" myself reaching this goal?

**Step IV** After each remaining dream/goal ask yourself these questions:

- 1) Will reaching this goal make me happier?
- 2) Will reaching this goal make me healthier?
- 3) Will reaching this goal make me more prosperous?
- 4) Will reaching this goal make me more friends?
- 5) Will reaching this goal give me peace of mind?
- 6) Will reaching this goal make me more secure?
- 7) Will reaching this goal improve my relationships with others?



Don't confuse pleasure with happiness, be sure to consider your family when you answer the 7 questions.

**Step V** Divide the remaining goals into three categories:

- Short-range (less than 1 month)
- Mid-range (1 month to 1 year)
- Long-term (longer than 1 year)

**Remember:**

- 1) Some goals must be **big** (out of reach-not out of sight) to make you stretch and grow to your full potential.
- 2) Some goals must be **long-range** to keep you on track and greatly reduce the possibility of short range frustrations.
- 3) Some goals must be **small and daily** to keep you disciplined and in touch with reality of the “nitty gritties” of daily life.
- 4) Some goals must be **ongoing**.
- 5) Some goals (sales, educational, financial, weight loss, etc.) might require **analysis and consultation** where you are before you can set the goals.
- 6) MOST goals should be specific. A “nice home” is not as good as “3000 square foot, Tudor style home with 4 bedrooms and a swimming pool, etc...”.

When you learn the formula for setting one goal, you will **KNOW** the formula for all goals.

- 1) Write it down.
- 2) List the benefits.
- 3) Identify the obstacles and the critical success factors.
- 4) Spell out the attitudes, skills, behaviors and knowledge required.
- 5) Identify the people, groups and organizations involved.
- 6) Work out an action plan / Blueprint.
- 7) Set a date (if applicable).

**“PRIME THE PUMP”**



### GROUP DISCUSSION OF KEY IDEAS FROM PRESENTATION



List what you think are the most important ideas from the presentation and how you can apply them to your role. Share your thoughts in small groups.

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How does your natural behavior play a role in your ability to implement your key ideas?

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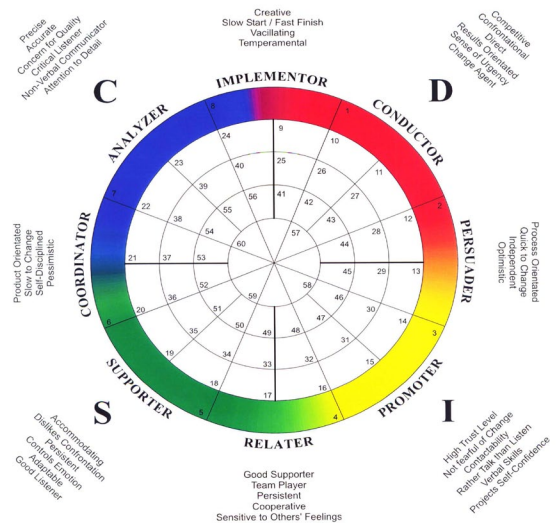
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- a. Significance
- b. Vision



**Blueprint #1 - Dream List & Wild Ideas Sheet:** STEP ONE in the planning and goal setting process Zig Ziglar recommends to create a 'Dream List' & 'Wild Ideas' sheet, where you list everything you want to be, or do, or have. Complete this step in the space below.

**“Dream List” & “My Wild Ideas”**

I want to **BE**:

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I want to **DO**:

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I want to **HAVE**:

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As you review your 'Dream List & Wild Ideas', apply Steps 2 - 5 of Zig Ziglar's goal setting process from page two and three of your participant packet. For instance, how many items on your 'Dream List & Wild Ideas' are Physical, Mental, Spiritual, Social, Career, Family or Financial goals? Do you have balance? How many are big, long-range, daily or specific goals?

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**Blueprint #2 - Is this the right goal for me?** Consider one of your goals and try to further define it by completing the information below.

1. Identify your goal in one specific sentences (20 words or less). Ask yourself if you can vividly picture how great it will feel when you achieve the goal.

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2. Why do you want to achieve this goal? Will this goal enrich the lives of somebody besides myself? Be specific.

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3. Is this a big, long-range or daily goal?

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4. Answer these questions about this goal:

Is this my goal? \_\_\_\_\_

Is it morally right and fair to all concerned? \_\_\_\_\_

Does this goal move me closer to one of my major objectives in life? \_\_\_\_\_

Can I emotionally commit to this goal? \_\_\_\_\_

Do I believe that I can reach this goal? \_\_\_\_\_

5. What are the first three action steps you will take to achieve this goal?

1. \_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_





**Blueprint #3 - Planning Worksheet:**

Working individually, or with others from your company, or work group, create a plan for an upcoming event or project to be implemented during the coming year.

Goal, event, or project to be planned:

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Visualize with “the end in mind” the expected results for our organization, workgroup or self. How will you know you’ve succeeded?

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Why do you want to achieve this plan?

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What are the benefits of successfully achieving this plan?

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**Step 1: GET THE FACTS, avoid opinions or judgments:**

List the facts you know:

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Are any additional facts needed for planning?

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Have you made any assumptions regarding the facts?

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What facts should be considered from past experience and knowledge?

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This sheet is focused on **short, intermediate & long-term** goals.

**STEP 2: GOALS.** What do you or your team want to accomplish?

**STEP 3: OUTLINE HOW TO ACHIEVE THE GOAL.** What specifically needs to be done?

**STEP 4: WHO IS TO BE INVOLVED?** Who will be responsible for what?

**STEP 5: TIMETABLE.** When should specific tasks be accomplished?

**STEP 6: WHAT RESOURCES ARE NEEDED?** People or materials needed?

**STEP 7: MEASUREMENT FOR SUCCESS.** How will you know when it's successful?

***Short - Range Goals (less than 1 month)***

WHAT?

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WHO?

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WHEN?

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RESOURCES / MEASUREMENT?

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***Intermediate - Range Goals (1 month to 1 year)***

WHAT?

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WHO?

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WHEN?

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RESOURCES / MEASUREMENT?

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***Long - Range Goals ( longer than 1 year)***

WHAT?

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WHO?

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WHEN?

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RESOURCES / MEASUREMENT?

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### **STEP 8: IMPLEMENTATION PLAN**

How should this goal/event/project/initiative be introduced to best gain the acceptance and “buy-in” of those involved?

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List any possible objections. How should they be handled?

1. 

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2. 

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3. 

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Should corrections be made based on feedback from others? Give examples.

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### **STEP 9: MONITORING PLAN TO FOLLOW-UP AND FOLLOW-THROUGH**

What needs to be reported back?

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Who will collect this information?

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How will “course correction” be made, if needed, and by whom?

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How will the planning team communicate?

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**STEP 10: PERSONAL COMMITMENT**

Potential concerns.

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Potential help, coaching and or training needed.

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When and where do I communicate my inability to keep project moving forward without any major delays.

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- Do I clearly understand my role and expectations? Y or N
- Is it morally right and fair to all concerned? Y or N
- Does this move us closer to one of our major objectives? Y or N
- Can I emotionally commit to this goal? Y or N
- Do I believe that we can reach this goal? Y or N

Signature and date:

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# My Personal Blueprint for

Strategic Planning and Goal Setting



Name: \_\_\_\_\_ Employer: \_\_\_\_\_

Date: \_\_\_\_\_ Manager's Name: \_\_\_\_\_

I plan to **implement**: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The expected results for our organization, workgroup and personally include:  
\_\_\_\_\_  
\_\_\_\_\_

**Specifically**, I will \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Measurements** for success include (e.g. lower costs/increase retention/revenue targets/quality)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Attainment** requires (e.g. staff/budget approvals) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Relevant** to Company Goals, \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Time-based** plan is to be started by, evaluated by and accomplished by:

I will start this goal by: \_\_\_\_\_ I will evaluate this goal on: \_\_\_\_\_ I will complete this goal by: \_\_\_\_\_

**Action Steps** to be taken include:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

I/we need the following people/materials/resources to reach this goal: who, what, when & where:

\_\_\_\_\_  
\_\_\_\_\_