

# WEEK FOUR - GAME PLANNING

## BRINGING IT ALL TOGETHER

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

**Objectives:** The goal for this final week is to take what you have learned and decide what action steps you will be making in the coming months to take your business where you want it to go.

### Step 1 - Review Your Position

Take a few moments to review your notes and exercises from previous weeks. Refresh your memory on your core values, core focus, uniques, and practice guarantee. Consider who you have on your bus and what they need to be successful. Review your KPIs to assess your practice's financial position, strengths, weaknesses, and growth trajectory.

Now that you have a clear picture of your practice, let's decide where to go.

Remember your 10-year goal? It's the BHAG we discussed in week 1. It's the point on the horizon you want to head for. Is that still where you want to go? If not, let's update the 10-year goal now.

In 10 years, I want to see myself and/or my practice:

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## Step 2 - Consider Your Issues

We know generally where you want to go and how you're currently doing. Let's consider the obstacles you are facing or will soon be facing. Remember, our ability to advance is directly tied to our ability to solve problems.

### Creating an Issues List

It's time to come up with a list of issues that need to be addressed. Before we do though, I need to give you some ground rules. ***This is an exercise for your leadership team. You will need their input.*** This needs to be an open discussion of the challenges your practice is facing. This meeting needs to be safe for everyone involved (including you!). That means people should be able to talk about the challenges they see without worrying about damaging their standing in the practice or their potential for growth.

This meeting is **NOT A BITCH SESSION!** We are talking about issues, not complaints, vents, etc. This meeting should be positive and supportive. We are doing this to be open about what our challenges are so we can try to address them. No one should come to this in the spirit of tearing anyone or anything down.

### Create The List

Brainstorm with your leadership team the issues and challenges your practice is facing. [I like to put a positive spin on these and talk about things we would like to overcome/accomplish/improve].

As you list these challenges, put them into one of three categories:

This week

This quarter

Beyond 90 Days

\* Stephanie started to give you paper to do this and realized you are all overachievers and probably need a giant white board or paper hanging on a wall. Go BIG!



# Brainstorm List

Decide if issues are Urgent, Important, Both, or Neither?

## Prioritize Your Issues

If I told you that you could only work on three of these issues, which three would you choose? (Challenges your team must face this week are usually exceptions, unless you have deemed them “unimportant.” In that case, I would subject them to the priorities exercise)

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#2) \_\_\_\_\_  
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#3) \_\_\_\_\_  
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## Solve The Top Issues

Discuss your top 3 issues with your leadership team. Get input from everyone involved, and make a plan for how you will tackle these problems. Create action steps, set deadlines, and assign responsibilities.



## Step 3 - Pick Your Priorities

### Brain Dump

Make a list of your practice goals for the next 12 months. Don't hold yourself back or question your goals. Just get them down on paper.

### Tournament of Goals

Once you have your list, start to circle the goals you believe are high priority and scratch through those that are lower priority. When we are done, you should have 3-7 goals that your team is going to actively pursue in the next 90 days.

Remember the 5-Fold Why as your list gets shorter. This will help you refine your goals to find the ones that truly matter.

### Make SMART Goals (& Delegate Them)

Continue to refine your goals as you go. When you are done, the priorities you decide to pursue should be SMART goals. Each one should have clear deadlines in the next 90 days, and each one should have a point person who is responsible for completing the designated action steps.

[It helps some people to organize their goals into 3-year, and 1-year goals, as well as the 90-day goals we are focusing on here. I understand this is beneficial to some, and don't deter anyone who wants to put these longer term goals together. I have found, however, that practice positions change quickly, and repeating this exercise quarterly is far superior to creating a 1-year plan and trying to execute it without losing steam.]

