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1. **3 Goals**. All activities have three types of goals: those that are urgent and important, those that are important but not urgent, and those that are meaningful. For example, a business needs to make a profit. This is always urgent and important. A business needs team members who are expert professionals and have fast and efficient procedures. This is important but not urgent. But the business, its owner, employees, and customers also have goals beyond money and expertise. These are meaningful goals and, while not always practical by themselves, are vital to our intrinsic needs.

   a. **3 Goals for Business**. 1) Profit. 2) Expert team members and procedures providing world class service. 3) Greater Purposes.

   b. **3 Goals for Customer.**1) Fast relief and satisfaction. 2) Complete resolution of what the customer wanted and needed, resulting in satisfaction, delight, and gratitude of the customer. 3) What this now allows the customer to achieve with their life: more happiness, greater freedom, more affection, etc.

   c. **3 Goals for the Team Member.** 1) Personal income. 2) Expert proficiency, recognized, and in command of their area work responsibilities. 3) Meaningful professional goals that align with those of the business and higher personal purposes.

   d. **3 Goals for the Individual.** 1) Personal security (money). 2) Happiness. 3) Active in pursuing personal life goals.

2. **Ben Franklin List (of Virtues)** The Ben Franklin List is a list of your personal values. These are the standards to which you hold yourself to in how you conduct your life. are derived from the Golden Rule: *Do unto others what you would have done to you.* is inspired by Ben Franklin, who had a list of 13 virtues he strove to meet. For example: *Lose no time; be always employ'd in something useful; cut off all unnecessary actions.*

3. **Big Shifts**. A Big Shift is a term in the Goal Driven System that defines a significant change in the operating basis of the business. You cannot expect different outcomes if you keep doing what you always have been doing. If you want improvements, you must make major alterations to what you have been doing. These changes can't be slight. They can't be superficial. They need to be significant and reinforced on a regular basis., like people, don't change easily. We all are creatures of habit. We have identified 20 major changes, or Big Shifts, you will have to make to move from a Personality Driven Practice to a Goal Driven Business.

4. **Business Drivers.** We have identified five *major engines* in a business that propel it towards its goals. Most businesses don't employ all five, and the ones that do use are usually constrained and limited. The Goal Driven System clarifies each driver and shows you how to energize it to full power. five drivers are: Marketing, Leadership, Management, Service, and Personal Happiness.

5. **Business Mission**. A mission statement is a policy that a business can use to help all stakeholders understand and agree to the primary goal of the business. is a leadership and management tool, often neglected minutes after it has been written. Properly used, it can remind everyone of the greater purposes of the business, and help them keep their professional goals aligned with those of the business.

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6. **Business Values**. The behavior goals of all team members are generally defined by the core values of the business. Not always achieved each day, they still are goals each person should strive to achieve. For example, from the Internet clothing company, Zappos, "Deliver WOW through service."

7. **Bypass-Itis.** This is a very destabilizing and often destructive management ailment. It crushes motivation, demoralizes team efforts, and ultimately costs the business money. It is very common. It usually occurs when the owner, or manager, bypasses the employee ordinarily responsible for an activity or procedure and does it themselves. An example would be if the manager, whose had the duty of recruiting new employees, found out that the owner has taken over parts of the recruitment function. This confuses the manager as their role has been ignored and their assumed expertise rejected. In effect, the owner is now the manager, having taken over the manager's job. The owner will find that they are doing more and more of the manager's job. On occasion, one person doing another's job in an emergency or time crunch is necessary. But the duties should be respectfully returned to the person originally responsible as soon as possible.

8. **Case Management Meeting.** This is a fast and simple procedure undertaken by all support staff and providers. In the morning before the day starts, all team members review what customers are going to be serviced that day or in the next few days. Not all customers need to be addressed if the volume is high. All team members are to add any relevant information regarding each customer so that the provider can make any changes needed in the customer's next encounter. The process takes only a few minutes and helps improve the quality and completeness of customer service.

9. **Checklists: Job and Department**. A job checklist is a list of procedures that are assigned to a specific role or department. At the top of the checklist are the goals, both mission and outcomes, and Key Performance Indicators. The procedures are listed as duties. Only the most important ones are listed. The checklist can be used as an assessment to verify that all items were completed on a monthly basis. They are the responsibility of the individual in charge of the department, or for the role to which they are assigned, to keep it current and updated.

10. **Coaching Review.** This is an extremely useful management tool. It combines regular performance feedback, coaching and training as needed, and personal caring communication. To read the instructions on how to implement this procedure, go to: www.goaldriven.com/gdbtools.

11. **Communication.** The essence of communication is understanding. When one person strives to understand the other person's communication, and then works to ensure that that person understands them, a mutual understanding can occur. This applies to personal encounters as well as to workshops and newsletters.

12. **Compliance**. Compliance is the disciplined act of following, adhering to, and obeying policies and procedures. In some cases, this might also include government statutes or professional guidelines. When it comes to business success, failure to stick to past successful procedures stifles forward progress.

13. **Cooperative Coaching.** Team members can help each other improve learning and applying procedures by coaching each other. This is done by taking a procedure on a job checklist and practicing it.

14. **Customer.** Anyone who pays for a service is a customer. Whether a client, a patient, a member, a business always has to view the person paying for a service as a customer. It can never be overlooked that your customer is paying for a service and may always question whether they could be getting a better value from another provider.

15. **Customer Pathways and Information Channels.** The quality and quantity of service depend, in part, on the efficient pathway customers take as they receive services in the business. It also depends on the smooth and unconstrained flow channels of communication within the business. The sequence of encounters for the customer should be fast and pleasant. For example, the customer should not be sent from the front desk to wait in the billing office, but to a service provider. Walk-throughs help iron out any rough spots in pathways.

16. **Department Organization.** Combining common functions into groups or departments can help customers and information move smoothly through the business.   Think of a baseball diamond where the runner travels from first base to second base. Each base has different responsibilities. In smaller businesses, one person may be responsible for a few departments, such as the front desk, customer accounts, and supplies. In larger businesses, several full-time and part-time people may be in each department, with someone spending a few hours each week coordinating and managing the department.

17. **Direct Response Marketing.** Direct response marketing is simply making a very appealing offer to customers or potential customers that is only good for a limited time. You are seeking a response directly from your promotions. In public relations, on the other hand, you do not receive a direct and immediate response, though it can help you in the long run and make your direct response marketing more effective. In the beginning of business growth, direct response marketing is essential.

18. **Financial Management.** Finances, like anything else, need to be managed. In the Goal Driven System, we focus on:
    - Regular review of expenses and revenue. (monthly)
    - Ensuring expenses are always less than revenue.
    - Creating a legitimate expense that also acts as a savings account.
    - All expenses, from personnel to marketing, are weighted against the financial return.
    - Everything is based upon Return on Investment.

19. **Full Capacity Goals** The Full Capacity Goal is the maximum number of customer encounters that can be seen in any week. This gives a realistic goal that can be achieved, bit by bit, as the business develops. Once the full capacity is reached for many months or years, the next business developmental plan can be designed to increase capacity, or simply to make operating at full capacity more enjoyable.

20. **Gamification.** This term is used in the design of computer games but can be applied to any activity. Games are universal and popular. From infants to adults, we all like to accept challenges and attempt to overcome them. Games are play and should be fun. The elements of gamification are threaded throughout the Goal Driven System so that your business, as it implements the Goal Driven System, will experience more enthusiasm to achieve its goals.

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21. **Goal.** A goal is the final objective intended to be reached. There are higher or visionary goals, such as a mission or a purpose. These are manifested practically as outcomes and targets. Purposeful or practical, a goal is the end in mind.

22. **Goal Driven Business.** A Goal Driven Business is motivated by its goals and managed by its team. It operates very profitably at close to full capacity and delivers world class service. Its team members' professional goals closely align with those of the business. Employees are happy, becoming more competent professionally, and through the business, can actively pursue their greater purposes. business also makes a significant impact on the well being of its community and environment and allows the owner more time to devote to their greater purposes.

23. **Goal Driven CEO and Coach.** In the Goal Driven System, the CEO is a leader and a coach, insisting that all business development drivers or engines – marketing, leadership, management, service, and personal development – are achieving their goals. This role is usually not assumed in service businesses, and instead the business is managed and driven by the roles of business owner or service provider. In the Goal Driven System, many of the CEO duties are eventually shared and delegated with the team in Total Team Leadership.

24. **Goal Driven Manager.** The Goal Driven Manager develops the business by ensuring that proven past successful procedures and policies are implemented, kept in place, and improved upon. They also help ensure that team members are improving their skills in applying the procedures. This role is the most important Big Shift an office can make as it is *the leverage point* that ensures all others occur and remain in place.

25. **Goal Driven Marketing Coordinator** Effective marketing requires someone in charge. Too often the owner is in charge but is too busy to ensure that marketing procedures and events are continuous and improving. Since everyone in the business has marketing duties, the Marketing Coordinator acts as a project manager to coordinate all activities and ensure they are occurring. Their focus is on new customers, retained customers, and reactivated customers.

26. **Goal Driven Principles.** The Goal Driven System is derived from fundamental principles in physics, biology, and human behavior. The system is not based upon fads, or on how a business owner with a strong personality succeeded by doing it "their way."

27. **Goal Driven Team Meetings.** Meetings can be very useful to keep everyone informed on how the business is performing and how each team member is contributing to the goals. They are useful to coordinate business-wide projects, set goals, engage in training sessions. The purpose of every meeting is improvement. Those who attend do so as a team-members and not spectators. Whether learning, coordinating, or planning, everyone is actively involved.

28. **Goal Graph.** A Goal Graph shows an accumulation of what is being measured, with the vertical axis showing the quantity and the horizontal axis showing the time. For example, if the business has a goal of 20 new customers in a month, the vertical axis would have increments of 1-20, and the horizontal axis would show 30 units for days of the month. At the upper right hand of the chart would be the goal of 20, and a line (the "goal line") would be drawn from the bottom left, which would be 0, to the goal of 20 at the upper right. Each day of the month, a mark could be plotted showing the total number of new customers for the month. The business would want to keep the number of new customers on, or above the Goal Line.

29. **Goalineer**. This is a made-up name combining engineer with goal. It is a person who engineers their way to goals.

30. **Goals Achievement Process** (G.A.P.) The G.A.P. is a 7-step procedure used to improve performance in a business. It is a step-by-step strategy for continuous improvement. The seven steps are: 1) Review. 2) Discover What Worked. 3) Discover What's Not Working 4) Document. 5) Plan. 6) Implement. 7) Schedule the next G.A.P..

31. **Goals Lab.** The Goals Laboratory is the description of a place and time where you go to improve your business, your team member's skills, and yourself. It is too difficult to work **on** improving the business while you are busy working **in** your business. Time needs to be scheduled, and a location must be designated formally to focus on improvement.

32. **Groundhog Day Syndrome.** The Groundhog Day Syndrome occurs when circumstances force you to do the same activity routinely, with no variation, over and over. The term is taken from the movie with Bill Murray called "Groundhog Day." In it, the main character visits a town in Pennsylvania where everyone watches to see if a groundhog can see its shadow. The only problem is, for this character, the day keeps repeating and repeating, with the same routines each day. It never ends! It drives the character to suicide, but even that doesn't work. Finally, he falls in love and wins the girl and has a new life. achieves his goal and gets a reward!

33. **Job Checklists**

34. **Key Performance Indicators** (KPI's) Also known as KPI's, performance indicators are usually presented in terms of statistics that measure the number of outcomes or preliminary outcomes of a business. The Basic KPI's include the number of new customers, number of customers seen, amount of charges, and amount of collections. There are other numbers and ratios that can be used to measure quality of service as well.These need to be compared to the same indicator over a time period, as in "apples to apples." This will demonstrate if the performance is improving and moving towards the goals or away from them. Line charts are especially useful to show monthly trends toward the goals, or away from them.

35. **Leverage Points.** There are areas in the business that if reinforced or changed, a significant improvement can occur. A leverage point can include people, procedures, space, or equipment. It is where a slight change brings a big improvement.

36. **Manager-CEO Briefings.** The manager updates the CEO each morning on important administrative issues, including Key Performance Indicators. Then, the CEO relates all their administrative concerns to the manager. The manager addresses these issues during the day and the next morning, briefs the CEO on the KPI's again, and follows up on how they remedied any issues that concerned the CEO. This helps keep the CEO focused on their duties as a provider and leader and not distracted by daily management issues.

37. **Marketing Attitudes.** Marketing always starts with attitude. We have identified eight key attitudes that help increase marketing results. An attitude is the way you look at he world. You have a choice, however small, in how you view your life. Keep deciding each day on one of these marketing attitudes, and your marketing will improve.

38. **Marketing Manager System** (sm). A system developed by Ed Petty in 2000 designed to systematize marketing procedures in a professional practice. It ensured that certain marketing functions were agreed to be performed each week and month, and that someone was

responsible for seeing that this occurred. Properly done, the Practice and Business Roller Coaster would be lessened or become obsolete and a steady flow of customers would be realized.

39. **Marketing Network.** An external network of businesses, organizations, professionals, and individuals that all share similar goals as your business and are therefore willing to refer customers to you and to others in this network.

40. **More for Less.** As the business becomes more efficient, management strives to accomplish more with less expense in time, personnel, and finance. This is a basic theme in a Goal Driven Business. This is not as important in the first few stages of the development of a business, but is especially critical in the last stages of business development.

41. **Outcomes.** A service business helps each customer achieve that customer's goals. These can be defined as outcomes. The business has its Complete Outcome that it intends to achieve with each customer, as well as Preliminary Outcomes. For example, for a dentist, Preliminary Outcomes would be a patient who is scheduled for an exam, a patient who arrives at the office on time, and a completed oral examination. These three Preliminary Outcomes, and others, will eventually lead the patient to achieve their Complete Outcome. This would also be the tangible manifestation of mission of the business. For example: "A patient who has achieved optimal oral health, who is very happy with their service, and now continues to maintain and improve their oral health."

42. **Pareto Principle and 80/20.** The Pareto Principle is named after an Italian economist in the late 1800's. Pareto noticed 80 percent of the land was owned by 20 percent of the population. It can be extrapolated that there is an uneven ratio in many activities. For example, most automobiles travel on only 20 percent of roads, and 80 percent of what you wear comes from 20 percent or less of what is in your closet. In business, it is important to identify the 80 percent of your efforts that only produce 20 percent of the outcomes and focus efforts on the 20 percent that produce 80 percent of your results.

43. **Parkinson's Law.** Cyril Parkinson was a naval historian who wrote a book called "The Pursuit of Progress" published back in 1958. The first two sentences in Chapter 1 say it all: "Work expands so as to fill the time available for its completion." This can apply to having more staff than needed. It can also apply to finances – where expenses will increase to meet income.

44. **Personality-Provider Driven.** A personality practice depends on the provider's energy and emotion to keep it going. It is an entrepreneurial practice that requires tremendous effort and inspiration from the owner who, as a doctor, plumber, or attorney, is a "one-man-band." The owner drives the practice forward using raw emotional energy. This works until the practice grows and needs greater administrative support from a trained and motivated manager.

45. **Playbook.** This is a simple binder of how to manage customers or the business itself. It consists of policies and department and job checklists. It only has the vital policies and procedures that are time-tested. It is kept as a hard copy and should be referred to often and altered as needed. This a useful management tool.

46. **Policies**. General rules that apply to the entire business, such as work hours and dress code. also include the office mission and its core values as policy. Policies are agreements that everyone in the business learns, understands and agrees to, and follows, so long as they are employed.

47. **Practice Business Cycle** The Practice Business Cycle defines the sequence of actions that take place throughout the practice on a continuous basis that generates revenue through marketing and service. In a small business, each department immediately and directly affects all others. This cycle can be viewed from a physical perspective as a bicycle chain where each link is directly connected to another.

48. **Practice Development Assessment.** This is an assessment to determine the developmental stage of your business and its key departments.

49. **Procedural Atrophy.** Procedures have a natural tendency to wear away. Essential actions in a business are gradually reduced through neglect and shortcuts. In some cases, this removes redundancy and streamlines jobs. But in many cases, quality suffers because the full amount of detail was left out. A welcome letter to new customers was useful when the business was growing. But now that the growth has stopped, so has the welcome letter. When enough of these procedures are omitted, the business itself will atrophy.

50. *Que PASA* **Sales Procedure.** This is a procedure that can be used to educate prospective customers on their potential need for, and benefit from, the services offered by your business.

51. **Roles.** Every activity in business can and should be assigned to a separate identity that an individual assumes as a role. For example, the role of a paralegal, the front desk assistant, customer accounts coordinator, plumber, or doctor. Every role has a goal. An individual can have many roles. Every goal should be assigned to a role.

52. **Roller Coaster Syndrome** – The Practice and Business Roller Coaster affects nearly every business owner. Growth naturally occurs as the business owner and their team work hard to market and deliver their services. This growth continues until the organizational infrastructure can no longer accommodate the increased volume. There are insufficient support professionals and sometimes a lack of providers to maintain quality services. There is too much to do, so the business contracts. It went up, and then it went down. This will occur over and over until the owner finally settles at a lower volume of service that they can manage and not have to work seven days a week to keep up. The Goal Driven System can comfortably take the business through and beyond the organizational barriers that cause the roller coaster.

53. **Self-Determination Theory** (SDT) is a well-researched theory of human motivation. "The findings have led to the postulate of three innate psychological needs—competence, autonomy, and relatedness—which when satisfied yield enhanced self-motivation and mental health and when thwarted lead to diminished motivation and well-being. *Ryan, R. M.; Deci, E. L. (2000). American Psychologist. 55: 68–78.*" This theory complements the 3 Goals framework for the individual team member. Employees want to become more expert at their jobs, and they need to feel that the subject of their work is theirs to develop. Beyond work, individuals have a need for a higher purpose – a sense of community with their fellow employees as well as what the mission everyone is embarked on.

54. **Special Promotions Calendar.** This is a calendar of one time only, or infrequent, events for promotional purposes. For example, a yearly open house, a monthly workshop, a special dinner with the mayor. All these need to be scheduled and available for the entire team to see.

55. **Stages of Business Development** A business goes through different stages as it develops and grows. This is true with trees, plants, and people as well as businesses. Each stage is a separate

level or status and requires a unique strategy just for that situation. If the correct strategy is a followed, the business will move up to the next higher stage. If the incorrect strategy is followed, the business will decline. The Goal Driven System has five major stages of growth: 1) Starting or Re-staring, 2) Blueprinting, 3) People and Procedures, 4) Service and Personal Power, 5) Total Team Leadership.

56. **Team Member**. Each employee has one or more roles as a *specialist.* For example, specialist roles could be a provider, a bookkeeper, or a maintenance engineer. In addition, each person also assumes the role of Team Member. The mission and core values of the business define this role.

57. **Team Member Bonus**. According to the Self-Determination Theory, people are motivated by internal goals and not so much by external carrots or sticks. However, bonuses for success is a very natural phenomenon. Generally, life rewards us when we do well, and punishes if we mess up! Rewarding excellent performance of the business mirrors how we are treated by life. Financial rewards can be set up, or discretionary awards such as dinners, extra time off, or even a plaque that recognizes success. This could be for an outstanding month, quarter, or year. The idea of a team bonus also follows the theory of gamification, where someone who plays a game and wins receives a badge or a medal to acknowledge their competence.

58. **Telosen Training.** Telos is Greek for Goal. The Greeks believed that everything had an innate goal. Telosen is the virtual training center for all Goal Driven courses and programs.

59. **Total Team Leadership.** *Team Leadership* occurs when the business is so well developed that key members of the organization can act as assistant CEO's and provide most of the weekly management. This allows the CEO and business owner to look to the future of the business and chart out its next new venture.

60. **Training Maxims**. These are a number of aphorisms that summarize the importance of training. Most of these are by Ed Petty, but you should add your own. For example: *The more you learn - - The more you earn,* and *Don't Curse – Rehearse!*

61. **Unique Selling Proposition (USP)** The USP of a business are those specific benefits that it provides that differentiates it from comparable alternative companies. What is the business offering that people will pay for that similar businesses are not offering? That is a USP.

62. **Walk-Through.** To improve customer flow through an office or the conveyance of information between departments, a business can rehearse the sequence of its procedures. A popular method is to practice all the activities that go into servicing a new customer, from the first contact to their visit with the provider and the next scheduled service. The entire team participates. One person takes on the role of the customer, and someone, usually the CEO, manager, or business consultant, directs the walk-through and notices any areas for improvement, such as redundant procedures or inadequately trained staff.

63. **What is a Business?** A business is a systematized activity that produces outcomes and provides products for customers in exchange for payment. It is its own entity and not dependent upon any one personality. In a professional service business, it acts as the administrative infrastructure to support skilled providers who render a service. A business supports a practice.

64. **What is a Practice**? A practice is a network of relationships that is created and sustained through communication and service.