



YOUR TEAM SUCCESS PODCAST

A Goal-Setting Team Is A Self-Managing Team

Shannon Waller: Do you want your team to keep growing? Do you want them to be really excited about their future? Stay tuned to listen to how Strategic Coach does it and how this could be an incredibly worthwhile investment in your team.

Hi, Shannon Waller here, and welcome to Team Success. Today I want to share with you something that we've just done in our company meeting in January that I think was a stellar way to kick off the year. And it has to do with how you have your team members become self-managing, to be very growth-oriented, because if you want to have a growing company, your team members need to be personally and professionally growing as well. And we did this through a really excellent goal setting exercise. So I'll walk you through it. And I want to talk about what some of the implications are of investing in your team in this way because it was a big investment, over a hundred team members, you know, doing thinking, planning, conversing for half a day essentially, or three hours, that's not a small thing, but I think it's gonna pay off in space certainly from the feedback that we had, so I want to share this with you and if you're listening to this the beginning of the year, Happy New Year.

So what I'm talking about is, I'll actually walk you through how we did it. You could do your own version of this. And if you're in Coach, you're going to recognize some of these tools. And if you're not, you hopefully are curious and want to learn more. Check us out at strategiccoach.com. But we started off actually with, we have an MC who is lovely—just brings a ton of energy. She's amazing. Rebecca is from the UK and just a bright light. So to kind of start us off, started talking about intentions for the year, more than New Year's resolutions or things like that. But what was your intention? And to base those on your values. and a particular profile that we use called PRINT, which talks about your deepest motivations, why you do what you do from an emotional standpoint. And that was just really great coaching because it meant that people weren't in what we call “The Gap” about their goals. They weren't already feeling like they're failing New Year's resolutions. It was really just about setting an intention. And then she asked us to come up with a word and mine was capable, which is probably wanting to transform some of what happened last year for me. So we kicked that off and then we did what we call a Positive Focus. And if you want to download this, it is available at yourteamsuccess.com in the download section. So feel free to help yourself to this. Instead of doing it on a quarter, we actually did it on the year. And that was really cool.

So our team member, Marilyn, walked us through this fabulous sample copy, three business, two personal, in terms of what was our main progress for last year? What were our wins? Where could we see where we've grown? It wasn't about perfection. Again, it's about progress. And then why? Why was this an achievement? And this is such a key part of The Positive Focus because it relates to our reasons for why this was an achievement, not somebody else's. This is not about our mother, our boss, our spouse, our friends, what they think we should be doing. Should's a Gap word. It's much more about where do we personally feel a sense of progress. I'm very clear on how individual our progress is. And then whether or



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not there was further progress and if so, a first action. So we kicked that off and then people chose a couple of them to share, or all five if you talk fast like I do, in a small group sharing, five minutes each for people. So 20 minutes to have a conversation about people's success in the past year.

And I just wanna relate why I think this is so important. First of all, as we're all spread out, a lot of us are remote or virtual a good chunk of the time. And opportunities for personal connection about things that matter are a little bit few and far between because we're focused on projects and tasks and making decisions and solving problems. But when do we actually stop and just reflect on our own personal progress with the people that we are spending eight plus hours a day? So that was really fun. And people then, when we came back to the whole group, just went through and kind of just shared other people's wins, a few of their own, and they just celebrated each other's progress. And that was so gratifying to hear. So that was step one.

Then Dan led us through an exercise, which he calls The Triple Play. And we chose three of those and found the connections between them and made some connections between one and two, two and three, three and one. It's one of those things where you don't think there's gonna be a connection, you're like, oh, this particular thing that I pulled off and that thing I pulled off, both of them... actually I'll share mine so you'll see what I'm talking about. So one of mine was coaching 10x for a full year. So that was a step up in clarity and confidence for me, and then also becoming a main platform speaker, not just a breakout room speaker. And a huge shout out to my fabulous coach, Deirdre Van Nest of Crazy Good Talks, for helping me get to that new level of confidence and capability. And then when I looked at comparing coaching 10x for one year and becoming a main platform speaker, or stepping more fully into that, I should say, because I have done a few main platforms before that, it was increasing confidence and capability. You'll notice that word is consistent here. It was like, oh, unless someone had asked me, like Dan, I would not necessarily have figured that out. So I connected the rest of them. And then he said, okay, well, what are your insights for 2024? Based on connecting and the insights that you've learned already, what are the insights that you want to apply into 2024? And boom, it just distilled down all of my learning.

And I've been doing some writing and journaling, which is highly unusual for me, trying to kind of process last year, because there was a lot that was going on. Personally, we renovated our house, we moved my mom, taking over Marketing as well as all my other responsibilities and accountabilities and projects. So it was a lot. And I've been trying to kind of like, figure out what the meaning was. And then all of a sudden in this minute that I took to fill out my insights, boom, they were right there. So just that ability to reflect on the past and to step into the future with what you're learning. One of the things we say at Coach all the time is, always make your future greater than your past. But how do you do that? Well, you distill down the lessons from the past. You don't have to relive the same experiences over again. But when you are able to distill down, what did I learn? What do I want to take with me? What do I want to leave behind?



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That's how you shrink your past so that you can have a bigger future. We all know people who, when you get together with them, it goes back to school chums and school friends where you can tell their best year was their last year of high school. It's like, oh dear, your past is bigger than your future. So it's really a matter of knowing how to distill it down to the most relevant parts that you want to bring with you and then applying those.

And then I got to lead an exercise we call The Bigger Future. Oh, actually, before we did that, Babs, co-founder of Coach, she shared our big 10-year vision. We run on EOS, Entrepreneurial Operating System, so part of that is your 10-year vision, which is on your Vision Attraction Organizer. So she shared our big, big, big future goal in terms of the number of people we're going to impact and our revenue goal. It's very exciting. And one of her strengths is futuristic, so she can paint that picture like nobody's business. Then she shared our three-year vision, which we have very well-articulated teamwork with Kathy and Babs to be able to really flesh that out in all the details that are relevant for our company. And then I led our team in our bigger future exercise. And again, you can do your own version of this, but I just wanted to share what we did because I think it's super cool. So we had people go six years out. What are your ambitions from six years from now? And the really fun thing is right in the year. So we wrote 2024 to 2027, 2027 to 2030. And then to really make it real, you write down your age. And most of us have not written down our age six years from now or if you do a longer term 10 years you're like, oh I'm gonna be that old, okay, a little bit of a gasp, lots of oh no in the chat, it was quite entertaining, and then so you fill out what we call the right-hand side, where this is your ambition for six years from now. At the end of six years, all of this will have happened, personally, professionally, financially, health, friends, family, spiritual life, all the things. And then that's your bigger future ambition.

And then I really love, this comes from an exercise that Dan created, Bigger Future, which is what are the capabilities that you need to put into place that will enable you to accomplish in the next three years that will enable you to accomplish all of these things in six years? And there's something for me that is much less scary, much easier to focus on building capabilities than necessarily accomplishing a goal. I know that sounds odd, but it's like, oh, I'm going to become more capable in this area. I'm going to learn how to do this and I'm going to learn how to do that. I don't know about you, but I like learning. Everyone I know is growth-oriented. Well, people I spend time with are growth-oriented. So, learning and becoming more capable is like a normal thing. Accomplish some big goals where I'm being pretty tangible and concrete about what I want, that can feel a little bit less known, but putting in place capabilities, not so hard. How this works out, so if someone, for instance, wants to travel and do some big trips, well, other than time, what do you need to travel with? Yes, money. So one of the capabilities is saving and so is there an automated savings account that your bank can set up for you or that you can set up with your bank. There's great apps for that and there's great systems out there so that you start to save money because money on a trip is a capability. Right? So that's



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something that has to happen. If you want to become certified as project manager, what's one course that you can sign up for?

So all of these little, it takes you back to something concrete and real that you can take action on that's doable, that's very exciting. And so that really just makes it very tangible. And then you focus on the next three years. Then we drilled it down to one year. And we also have this thing called a One-Year Challenge where we get together in groups once a quarter to kind of share progress on our goals. So we are very much about supporting our team's personal growth as well as their professional growth. So just to finish off the exercise, and I'll talk about why I think this is so important. So we went six years, Babs went 10 years and three years, I went six years and three years, and then we got down to one year. So people are authoring their own future. They are really putting down on paper in writing exactly what it is that they want. And it is a wanting exercise. Dan's first book of the Ambition Series was *Wanting What You Want*. And for a lot of people, they're not used to wanting, especially at work. I was just talking with my really good friend and colleague Katrina, and people are used to having goals maybe for their personal life, but a lot of people are not used to setting goals professionally. I mean, you've always got a few ambitious people who want to climb the ladder, so to speak, but especially if you're a Unique Ability company, it can be a little tougher to figure out what your growth path is. Essentially, the answer is expand the positive impact of your Unique Ability. That is the growth path in a Unique Ability organization, but it isn't like there's a predetermined ladder to figure out. If you do this with your team, you can do it with a colleague, you can do it with your team, you can do it as a company meeting, you can do it as a team meeting, lots of different ways to have this happen. It's really powerful to help people exercise that muscle in terms of how are they going to grow professionally? How are they going to become more capable? Are there some aspirations that they have? Do they want to be able to deliver presentations? Do they want to be able to have a certain project management certification? One of the things I love, love, love about our tech team, because they are such avid learners. So getting new certifications, big deal. And us supporting that and funding that, very, very, very meaningful.

So a question I have for you is, how are you helping your team grow? Part of it is you can have your path and what you think they could, should, would be doing. But are you actually encouraging them to do that thinking for themselves? And that's really the question I want you to ponder because I think it's very easy. It's like, oh, I think you'd be great at doing this. Go do that. And we don't give people enough sense of ownership and agency to figure out what it is that is meaningful and personal for them. But you know and I know that when we come up with the idea as something that we want to accomplish and then we put in place the capabilities to get there, no one can stop us. We are so excited. We have such ownership of that particular thing. There's fuel from the inside. When we just tell people or dictate it, that fuel is missing. We have to provide the fuel. I was reflecting back, I was reminded that my very, very, very first podcast, which was 235 podcasts ago or something, was actually batteries included. And this



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means that we are looking for team members who have what we call batteries included. As you all know, on Christmas morning in my case, there's nothing worse than getting a new toy as a child or a parent and where it says batteries not included, BNI. And you're like, oh man, you have to stop the present opening. You have to hope like heck you have some batteries and you have to reassemble the thing. And you're like, oh, there's nothing worse. So we want people who show up who do not always need to be plugged into a power source. We need people to bring their own battery packs with them. We're happy to provide the overall charge, but we need people to have batteries included.

So this is partly how you help do that. When you give people the time and the space, in our case the thinking tools, to be able to really reflect on their progress, you know, by all means, let them know where you're going, the right people will choose to continue with you. But then also decide what kind of ownership are they going to take of their personal future relative to your bigger future and relative to their personal goals. You have just tapped into an incredible, as I said, power source. So I think this is an incredibly worthwhile investment to make. Invest in your team's growth. If you want a Self-Managing Company, if you want a Self-Multiplying Company, you absolutely want to give time and space and energy and tools for this to happen. So, again, this is the why. If we want to be freed up, if we don't want to always be the one providing all the juice, all the passion, then we need to give people a chance to exercise these goal-setting muscles and celebrate the wins and to have little teams together. I mean, our meetings are one hour once a quarter. The investment is four hours a quarter per team member. For those people who choose to join, not everyone does. And it's cool to see everyone's growth. And we get to know one another better. I've gotten to know who wants to become independently wealthy and pay off their homes and have a passive form of income in our company. I get to know who wants to travel. I get to know who's got a house here and a cottage in the UK. Like there's all of this fun information that I found out that there's no other way this would come up. It's not going to come up in a casual conversation over the water cooler. You know, this is something that only happens out of being intentional. So I just think it's an incredible investment in your team.

So how can you do this? Set time, have it be your intention to be surrounded by not only growth-oriented clients, but growth-oriented team members who have their own aspirations, their own ambitions. Sometimes it can look like it's easier. People don't have ambitions outside of you. They just do what you tell them. But I have to tell you that's a short-term strategy. That's not a long-term strategy. What makes sense is to be on the journey with like-minded people who want to grow and show them how they can grow within your structure. Let them, you know, find out what their aspirations are. Help them accomplish that. Say, hey, I know your goal one day is to own your own alpaca farm or whatever that might be or, you know, travel to this country. What are the skills that you need in order to do that and how can I help you acquire those skills, right? And you know that by investing in people, I hope you know, that by investing in people, by finding out what they're up to, by supporting them in doing that, you will



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in fact get not only their gratitude but also their skill. You get a much more capable human and you've got someone who is with you. They don't feel like they have to go outside your organization in order to be able to grow. They are growing within your company, which creates loyalty. And that means you don't have to go look for a new person quite as quickly if and when they do leave. Then you've got a raving fan. You've got someone who highly recommends your company to other people who are a right fit. That is gold, my friends.

So I just really think you can't lose. It can look like a scary proposition because maybe people have goals that aren't in line with what you want them to do for your company. But you'll kind of be amazed that first of all, they would have left anyway. But if you can help them along the journey, and you can find a way for them to work with you, it's kind of amazing. I mean, we have incredible longevity at Strategic Coach of team members. The number of people who are five years, 10 years, 15 years, 20 years, 25 years, in my case, 32 and a half, actually, is kind of stellar. It's really, really unusual. And I think it's not just because we have an amazing culture, or maybe it's because part of our amazing culture, is we want people to always be growing. Always be growing is one of our mottos, not only for our clients, but also for ourselves. So we want to be very integrous in the sense of what we talk about with our clients is something we also walk. We walk our talk. And that doesn't just mean our clients growing, our team members have to be growing too. And even if you didn't need an outside justification for this, the world is changing rapidly. And if people are not rapidly growing and adapting to what is happening out there, your company is going to fall behind.

So, I think it is absolutely essential that we find interesting, fun, connected, genuine ways of helping all of our team grow that will benefit them and obviously it benefits you too and will also benefit your clients because they'll have great things to relate. They'll have so much in common with your clientele. So they won't just be static and your clients are growing. No, they'll also have great stories and examples and ways to collaborate with your clients because they'll have their own stories and examples as well. So just really, really, really want to encourage you to take action on this. And if you're already doing it, yay you, congratulations. I know you're probably thinking about this anyway, and you might be frustrated by people's lack of growth. So hopefully this has given you a path and a bit of a recipe for how to take action yourself. So on that note, bottom line, I think this is an incredible investment in your growth to invest in their growth through goal setting. And now is a perfect time to take action. That's it for today. Thank you so much for listening. As always, I really, really, really appreciate your input and feedback. So please let me know any thoughts, yays, nays, anything in between at questions@strategiccoach.com. And as always, here's to your Team Success.