



PETRA PROCESS

**QUARTERLY THEMES: KEEPING GOAL SETTING FUN
AND EFFECTIVE**



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LIFE LESSONS for BUSINESS OWNERS

One part of any planning session we do with a company is determining the organization's "quarterly theme." After a long day of planning for the upcoming quarter, talking business, hashing out agreements (and disagreements) and setting personal and professional goals, team members come together to agree on one over-arching theme that will carry them through the quarter and help them achieve their chosen company-wide goals. The process gives everyone a chance to get creative and is an exciting one.

For example, one of our member companies knew they needed to increase their online presence via blogs, but had not yet set themselves up to achieve their ultimate goal of driving prospects and clients to the website, increasing SEO, and accumulating content to use in sales meetings. So, they decided to take on a blogging theme – where each member of the team committed to complete three blogs for the quarter, to be posted on the company website. At another recent planning session, the team decided to make personal goals a focus for the upcoming quarter. Many people opted for fitness goals (weight loss, training for a 5K race etc.), while others opted to turn outward – determined to spend more intentional time with friends and family to nurture interpersonal relationships. Each team member decided how they would measure success and then drafted a design for a "challenge poster" to hang in the common area, where each employee could track progress throughout the quarter and celebrate their success at the end of the quarter with a company social event (this particular reward was a beer-filled bike ride on one of Nashville's many pedal bars).

Whether you choose a personal or company-oriented challenge doesn't matter. What's important is that you take the time to come together as an organization to make it happen – and that everyone has buy-in and accountability.

Here are four steps for a successful quarterly theme:

1. Compete for your theme.

What's better than a friendly competition? Just the idea makes most people smile. And that's what you want. Divide the members of your team into two groups – or more, if needed



(companies of 25 or more people tend to need more than two teams). Taking one of the main company objectives – such as increasing revenue by X% by the end of the quarter or signing X new clients each month – each team develops a fun way to track progress toward the goal. Once each team has huddled and developed their ideas, they should do a quick sketch, preferably on a large piece of paper, to show how it will work and be monitored. Then, come together as a company and have each team present its idea to the group as a whole (singing and dancing is optional, but encouraged) – and have everyone vote on it. That ensures the best ideas come to the surface.

2. Make sure your goals are clear and results are measurable.

As you develop your theme challenge, make decisions about how you'll measure success. What does a "win" look like and what are the steps you need to take to get you there. For example, if your challenge is for each team member to bring in two new business prospects for the quarter, determine exactly what that means. Do they need to sign contracts? Is it about developing relationships? Make sure it's clear to everyone how they can succeed and that expectations are realistic. The theme should be challenging, but should also tee the entire team up for success.

3. Everyone must be involved.

There's no room for wallflowers when it comes to implementing a quarterly theme. Everyone must take part. It could be that not everyone will be involved in the same way or to the same extent, but if you want to bolster morale and reach your goal together, you've got to have full participation.

4. Reward yourself!

Any good challenge – when achieved – deserves a reward! Sure, bragging rights are fun, but people like to celebrate success. So, decide what might be a fun reward to motivate team members through the tough times and reward them at the finish line. Maybe a pedal bar isn't your thing – it doesn't have to be. It could be a celebration at the office, where you order in the team's favorite food. It could be a trip to a theme park or a scavenger hunt out of the office. Not only will the reward recognize everyone's hard work, it will also bring your team together in a way that everyday work never will.

"Goals" and "tasks" don't have to be serious all the time. Make them fun and competitive and you're much more likely to complete and achieve them – especially if you're working together.

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The truth is that if your employees aren't growing and developing (individually and together), you're not getting their best – in or out of the workplace. The more you invest in your employees the more returns you'll see in productivity and company loyalty.

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THE PETRA EXPERIENCE

The Petra Experience is like a Mental Marathon of focused effort to create a specific set of priorities and a planned process to achieve them... as a team.

Looking to change your business life - forever?

The daily grind of growing a business is tough... it doesn't have to be that way. We work from our own business experiences while focusing on your business – as coach and an accountability partner. We implement the Petra Process in a way that ensures it “sticks” then we stay engaged to keep you on your path to success and less frustration. We don't want this to be just another thing you start – then it gets ignored and finally dies... let's stop that cycle in your business. The Petra Program 'clarifies' what is most important to be done – by whom, by when – **AND** creates an accountability structure to ensure **IT GETS DONE.**

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