



# PETRA PLANNING

SOUND GAME PLAN IS KEY TO FOURTH-QUARTER  
VICTORY



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### LIFE LESSONS for BUSINESS OWNERS

September 19, 2013

The leaves are changing and the Titans are on the field. You may say these are signs fall is on its way — I say they're indications your business's fourth quarter is approaching.

Just like a football game, your business' fourth quarter is where the action happens. It separates the winners from the losers, determines the final score and sets the stage for the next game.

If you want to win, you need a game plan. It's the solid foundation of any victory.

Yeah, I know, you're too busy. That's exactly why you need to huddle up and plan. It diminishes confusion and ensures you and your team members focus on what's important — not just what's urgent.

Proper planning requires one full day of your company's leadership — at a minimum — joining to discuss the four areas of planning:

1. Where are we now?
2. Where do we want to go?
3. How do we get there?
4. How will we ensure our plan is executed?



But as legendary coach Tom Landry says, "Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan."

Use these five planning parameters to ensure your plan gets executed.

**1. Limit Priorities.** The third step in planning (How do we get there?) is when you take on or assign priorities to each team member. These priorities typically align with step two (Where do we want to go?).

For example, if in step two, you and your team conclude you wanted to grow the business's revenue by x percent, team member Jack may take on a priority to sign three new clients in Q4. In completing step three, don't let Jack take on more than he can handle. You want him to be able to achieve his priorities.

I recommend no more than five priorities for each team member. Three is ideal. You can't achieve your goals when you have too many competing priorities.

**2. Delve deeper.** Your goals and priorities must be specific, measurable, attainable, relevant and time-bound. "I want to grow the company" isn't good enough. Instead say, "I will increase the company's revenue by x percent by Dec. 31." If your goals and priorities do not adhere to these five "delve deeper" guidelines, you tremendously decrease your chances of achieving your desired outcome.

**3. Review often.** I recommend meeting regularly with your team to check in on priority progressions and original plan relevance. Not only do these meeting rhythms foster accountability, they ensure the original goal is still appropriate. I suggest half-day monthly, hourlong biweekly and five-minute daily check-in sessions.

**4. Allow flexibility.** We all know business, sports and life in general rarely go as planned. If you and your team decide the original plan or goal is no longer relevant, or a team member is sidetracked from his or her original priority, that's OK. Allow and accommodate adjustments. In business and football, those who can react and readjust quickest are the ones who make it to the end zone.

**5. Celebrate small wins.** Just 2 percent movement toward your goal each week will get you to 100 percent in 12 months. It's all about the small, consistent strides. Celebrate your interceptions and tackles. It'll encourage and reinvigorate you and your team so you're charged to win the game.

If you're still on track with your annual plan, don't stop now. Finish strong in the fourth quarter. If you didn't devise an annual plan, it's not too late. Q4 is your opportunity to make 2013 a winning season.

# 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.**

*Andy Bailey is lead entrepreneur coach with business coaching firm Petra and serves as the Entrepreneur Organization's global membership director. Visit his blog at [www.petracoach.com](http://www.petracoach.com) for more business and leadership insight.*

### PETRA COACH

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