



ANALYSE CREATE MOTIVATE

## VUE in focus.

Objectives  
Inspiration  
Vision

### Effective Goal Setting

Professional services advisers not only manage their business, but they are the business themselves. It is easy for advisers to get wrapped up in the daily delivery of their services while the business ends up stagnating. As a result, Advisers lack goals, end up with competing goals or select different goals from those of the business.

*In Focus* provides advisers, managers and owners a structured forum to define the Vision of the business and the goals of each individual adviser.

- Clarify your business Mission
- Clarify your business Vision
- Establish key metrics
- Set Objectives based on metrics
- Prioritise Objectives and timeframes
- Create a succinct two page Plans
- Support and maintain the Plan

This structured process allows for team discussion and personal reflection, but ensures practical outcomes. Managers and advisers work from a unified Plan and talk a common language.



### *In Focus* will help you...

Clarify where you or your business is headed. Develop a structured, practical method to establish long-term vision and interim objectives. Refocus your efforts and resources.

- Establish a Mission
- Clarify your Vision
- Determine your benchmarks
- Write clear Objectives
- Create a two page plan
- Unify goals in your team
- Incorporate KPIs
- Provide opportunity to reflect
- Establish support mechanisms
- Get motivated to grow

# Vision

*Vision must be followed by venture. It is not enough to stare up the steps. We must step up the stairs.*

Vance Havner

## In Focus Workshop Agenda...

### CREATE

Vue Consulting's Learning Methodology is called ANALYSE CREATE MOTIVATE, representing the before, during and after stages of a training experience.

The CREATE phase includes our Workshops and face-to-face learning. **In Focus'** CREATE phase requires the equivalent of a full day of Workshop time, held as two half days 2-3 weeks apart.

The Workshop Agenda itself, covers the following modules...

#### Part 1 - Mission and Vision

- Define, clarify and/or understand the business Mission and Vision. This can be for the business as a whole or as individual Advisers
- Establish metrics to measure the progress of the business from the Mission (current) to Vision (future) states

#### Part 2 - Goals Setting

- Establish goals to bring the business from Mission to Vision
- Prioritise and set timeframes for each goal
- Craft a two page Plan to capture agreed goals and metrics
- Establish support mechanisms to help maintain the Plan over a longer time period

### ANALYSE MOTIVATE

See the Vue Consulting brochure for more details on the ANALYSE and MOTIVATE phases of our training.



ANALYSE CREATE MOTIVATE

## In Focus is particularly suitable for practices or advisers with...

#### Jaded, experienced advisers

Experienced advisers can get their "mojo" back, seek out new challenges and re-engage with the(ir) business.

#### Seeking the next step

You will develop more structured review processes to improve the value of each client to the business.

#### New teams of advisers

Bring the team together to harmonise their thinking and develop a consistent approach to business goals.

#### Lacking clear KPIs

You will clarify the key metrics in the business and establish parameters to form short-term targets and KPIs.

#### Feel "wheels are spinning"

You will gain tools, motivation and time to evaluate the direction of the business and establish forward traction.

#### Unsure "what's next?"

You will consolidate your existing business/skills and have a process to rebuild the new future of the business.

#### New managers/advisers

You will have an opportunity to evaluate the current and desired state of the business and quickly establish goals.