

Vision and Goals – Get Everyone Involved!

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According to a Franklin Covey and Harris Interactive Survey (March 2003) of 11,045 adult U.S. workers, 44 percent of those polled did not know their organization's highest priorities. Only 19 percent of workers had clearly defined work goals with a strong link to their company's top priorities. Accounting firms are no different. These same statistics most likely apply to your firm. If your people don't know the firm's goals, how can they help you achieve them?

Are you sure that everyone in your firm knows your goals? Many firms and companies do a poor job of communicating goals and thus limit the contribution their sales forces – their partners and employees – can make toward the firm's growth and success. If your employees don't know what the firm is trying to accomplish, how can they intelligently talk about and eventually sell its services?

GET STARTED NOW

Firm goals are the outcome of developing the mission, vision and core values of your firm. These three documents form the foundation to set short- and long-term goals. Don't keep this information a secret! Not only do you want to share all of the above with your entire firm, you want them involved in their development.

DO IT RIGHT

A mission statement is your firm's basic purpose. It tells everyone why you are in business. A good mission statement typically has three components. It states what the organization does, for whom and in what context.

To develop or revise your firm's mission statement, form a small task force of no more than seven people. James C. Collins and Jerry I. Porras in "Building Your

Company's Vision" (*Harvard Business Review*, September-October 1996), suggest that you write a draft mission statement on a display board and then use the *five whys*. Ask the group, "Why is that important?" five times. After a few whys, you'll find that you're getting down to the fundamental purpose of the firm.

While the mission statement is important, the most critical thing you can do is to develop a vision. This is an internal document that tells everyone in the firm what you would like to become. The vision for your firm is critical to the goal setting process. Where do you see your firm in five years? In ten years? It is also critical for getting your staff engaged in the firm. What does this vision mean to them? How will they participate in the future of the firm? Don't create the vision in a vacuum. Make sure that you get your staff and other key personnel involved in the creation process. Finally, you need to address what must happen in order for your firm to make your vision a reality.

Implementing a weak vision is better than *not* implementing a great vision. A vision without implementation is simply a vision – that is why you need to create the vision as a team. Don't go off to the

ARE YOUR GOALS SMART?

SPECIFIC – State your goals in the most specific terms available.

MEASURABLE – Be sure to quantify your goals and include a deadline.

ATTAINABLE – Your goals should be attainable to you, not to other people.

REALISTIC – Are your goals realistic within your set of circumstances?

TANGIBLE – You must be able to easily visualize yourself achieving them.