

TACTIC CARD

Business Goal Tracking

B.R.P

Business Resource Planning

Not every section below will be something you apply. The goal is to be able to lift your overall engagement in a few of the areas below. An increase in your Business Goal Tracking of 3-10% will bring in a noticeable return to your bottom line over the year, and ongoing.

A. OKR Template (O=Objectives | KR=Key Results)

1	Define Objectives: Write clear, actionable objectives (e.g. Increase market share). This is the step above KPI's.
2	Set Key Results: Identify 3-5 measurable outcomes for each objective. (e.g. Grow customer base by 20%).
3	Use a Template: Create or obtain an OKR template in a spreadsheet format.
4	Assign Ownership: Delegate each key result to a specific team or individual.
5	Review Quarterly: Setup regular meetings to review and monitor progress - adjust as needed.

B. Goal-Setting Best Practices (Track your Steps)

1	Start with Big Picture: Determine the big picture based on your businesses Vision and Mission.
2	Break Down Goals into Steps: SMART goals = Specific, Measurable, Achievable, Relevant, and Time-bound.
3	Align with Team Goals: Communicate goals clearly to your team to ensure alignment to department goals.
4	Set Deadlines: Each goal requires an assigned time for completion to increase the teams focus.
5	Monitor Progress: Keep track of progress to keep momentum going and adjust strategies as needed.

C. Quarterly Review Checklist (Review Each Play)

1	Gather the Data up to this point: Be sure to have in the review all the performance data for each Key Result.
2	Analyze Performance: Discuss and compare the goals to actual results for the goals created.
3	Identify Roadblocks: What obstacles can you identify that have hindered progress?

4	Adjust the Strategies in Place: In order to improve future outcomes, you need to test the identified roadblock solutions .
5	Set New Objectives: Keep moving the ball forward by creating additional OKR's for the next quarter.

D. Goal Alignment (Keep Communication Channels Open)

1	Communicate Vision: Company Vision and goals need to be shared consistently with the team.
2	Involve Teams in Goal Setting: Identify one champion who will promote the vision to each department and bring back feedback. It is important to address any pushback, no matter how small.
3	Department OKR's are crucial: Over all goals need to find their place in the departments for execution and improvement.
4	Encourage Collaboration: Silos disappear when departments are encouraged to work together on outcomes.
5	Reward Progress: Celebrating achievements will keep motivation high and momentum strong and hard to stop.

I hope you found this information helpful! You can implement these tactics on your own, but if you would like assistance, please feel free to reach out so we can discuss how we can work together.
Website: <https://businessresourceplanning.com/client-form>