



ESTABLISH YOUR THEMATIC GOAL

PURPOSE

A thematic goal provides a rallying cry for an organization—a clear direction for the entire organization for a fixed period of time determined by answering the question, “What is most important right now?”

TIME REQUIRED

Allow for 1-2 hours for the initial conversation—allotting time to review, reflect and refine if necessary.

DEFINITIONS

Thematic Goal

A single, qualitative focus or rallying cry that is shared by the entire leadership team—and, ultimately, by the entire organization—and that applies for only a specified period of time.

Defining Objectives

The temporary, qualitative components that serve to clarify exactly what is meant by the thematic goal; shared by all members of the team (and usually varying in number from four to six). Defining objectives provide a level of specificity so that the thematic goal isn’t merely a slogan but rather a specific and understandable call to action.

Standard Operating Objectives

These are the ongoing and relatively straightforward metrics and areas of responsibility that any leadership team must maintain to keep the organization afloat. These objectives do not go away from period to period and often include topics such as revenue, expenses, customer satisfaction, quality, etc.

This model originated from Lencioni’s best-seller, *Silos, Politics and Turf Wars*.

INSTRUCTIONS: THEMATIC GOAL EXERCISE

1. Ask every member of the team to individually answer this question: “If we accomplish one thing during the next x months, what would it be?” Share and debate answers. The goal should be to rally the troops, but more than anything else, it should give the leadership team clarity where to spend its time, energy and resources. Leadership team members may need to temporarily abandon their departmental objectives for the good of the organization as a whole. To help determine the thematic goal, consider these facilitation suggestions:
 - ☐ Have every team member write down their answer.
 - ☐ Estimate time frame (between 6-9 months).
 - ☐ Consider this supplemental statement: “If we do not accomplish _____, we have failed.”
 - ☐ If there is push-back over the need for only one goal, recite the adage, *“If everything is important than nothing is.”*
2. Once everyone has committed to answer, white board the team’s answers. Facilitation tips:
 - ☐ Encourage everyone not to hold back; ask the leader to go last.
 - ☐ Write down all goals and any needed clarifying statements.
3. Discuss the list and determine if some of the answers might actually be a standard operating objective. To determine this distinction, consider the following ideas:
 - ☐ Ask the questions: *“Is this something that is always important?” “When are we not worried about that?” “How is that different from last period, or next period or next year?”*
 - ☐ Remind the team that a thematic goal is only for a specific period of time, and then it goes away. If something is always important, it is more likely than not a standard operating objective.
4. Ask the team to review the newly sorted list to identify which goal rises to the top as the most important.
5. If there are discrepancies, ask team members to take 60 seconds to convince the team why their suggested goal is most important. Consider all suggestions.
6. Team must then put a stake in the ground to select the thematic goal.
7. Review the list of suggestions; many of these activities/concepts will likely populate the defining objectives and standard operating objectives.
8. Continue the discussion until you have 4-6 defining objectives (activities/components that define the goal) and outline several of your team’s standard operating objectives (areas of focus that don’t change from period to period).

Application: The thematic goal should now be the focus of the team's Weekly Staff Meetings (*Example page 175 in book*). Teams should grade their progress across all areas, using the green-yellow-red stoplight scale. Those categories with a yellow or red grade deserve the team's focus first. Once the goal is near completion, a new singular, time-bound, thematic goal should be established.

GOALS

For the thematic goal, a visual is extremely helpful. The following example is a hypothetical thematic goal of a famous tire company who was facing a crisis due to numerous crashes and safety concerns.

THEMATIC GOAL

The single, contemporary and qualitative rallying cry shared by all members of the team

Survive by Re-establishing Credibility

DEFINING OBJECTIVES

The temporary, qualitative components of the thematic goal; shared by all members of the team

Fix Tires



Improve PR



Repair Distributor Relations



Address Morale



Settle Lawsuits



STANDARD OPERATING OBJECTIVES

The ongoing priorities of the organization; shared by all members of the team

Revenue



Expenses



Production Levels



Market Share



Customer Satisfaction



Instructions: Input your team's thematic goal and print out this document for a daily reminder of what's most important and as a tool for your meetings.

OUR THEMATIC GOAL

DEFINING OBJECTIVES

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STANDARD OPERATING OBJECTIVES

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