



# Guide: Top Business Objectives

This document contains:

Part 1: **Overview**

Part 2: **Getting Started**

Part 3: **Capturing Top Business Objectives**

Part 4: **Creating an Action Plan and Tracking Progress**

This guide was created by Brand Integrity Inc. to correspond with Truth 1 of the *Achieve Brand Integrity* book. For help with this guide or any of the exercises, please feel free to contact us at [info@brandintegrity.com](mailto:info@brandintegrity.com) or 585.442.5404.





## A Brand Strategy Is the Ultimate Business Strategy and Often the Least Understood

# ACHIEVE BRAND INTEGRITY

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# Guide: Top Business Objectives

## Part 1: Overview

Top business objectives clarify what it is you are trying to accomplish in specific, measurable goals. For an objective to be effective, it needs to be a well-defined target with quantifiable elements that are measurable. Objectives should focus in on the accomplishments your company must achieve within the next 12-18 months in order to be successful.

## Components

### Primary areas of focus:

1. Determine the most important Top Business Objectives to hit. Draft high and low (macro and micro) objectives:
  - The high objective (macro) consists of the category of focus. Potential categories include financial, marketing and sales, human resources, culture, research and development, manufacturing, operations, etc.
  - The low objective (micro) becomes a statement of what you want to see happen with respect to the high objective, along with a realistic deadline.
2. Document the action areas that need to be focused on in order to hit the micro objectives. These action areas provide detailed descriptions of the activities required to hit the objectives.
3. Describe the impact of achieving the objectives to the organization. Impacts are tangible performance indicators such as productivity, cost-savings, bottom-line performance improvements, top-line customer growth, and process enhancements. Also include the impacts regarding employee satisfaction, retention, and overall productivity.
4. Develop key measures to assist with evaluating success. Try to include all observable milestones that you want to hit along the way.



# Guide: Top Business Objectives

## Part 2: Getting Started

Recommended number of participants: 2 to 4 leaders in your company  
 Recommended time: 60 to 90 minutes

The following pre-session assignment includes two exercises that will provide directional insight into potential business objectives for your company.

The results of your pre-session efforts will provide you the necessary input to begin drafting Top Business Objectives for your company. Once all results are gathered, reviewed, and organized, you will begin to see the themes that indicate potential areas of focus for building objectives.

### Exercise 1: Celebrating Accomplishments

Brainstorm as many accomplishments that you would like to be celebrating at the annual picnic or company dinner. Below are a few “trigger phrases” to help get you thinking.

Congratulations, we successfully completed \_\_\_\_\_

We are proud to announce the beginning of \_\_\_\_\_

We no longer have to deal with \_\_\_\_\_ because we \_\_\_\_\_

We increased \_\_\_\_\_ by \_\_\_\_\_

We decreased \_\_\_\_\_ by \_\_\_\_\_

### Responses:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.



**Exercise 2: Describing What Success Looks Like**

In this exercise, you need to describe what success looks like for your company.

Rethink past experiences and what have you learned from them to answer the questions on the left. Imagine what your future success will look like as you brainstorm answers to the questions on the right. Use the table provided to document your answers.

Past	Future
Where have you been successful in the past? 1. 2. 3. 4.	How might you expand upon your past successes? 1. 2. 3. 4.
What were some of your past mistakes? 1. 2. 3. 4.	What have you learned from your past mistakes? 1. 2. 3. 4.
What are some ideas that your company has not acted on? 1. 2. 3. 4.	Which company ideas should you consider acting on? 1. 2. 3. 4.

**Gather, Review, and Categorize Themes**

Now that you have gathered viewpoints and aspirations from a few leaders, review all of the responses and begin to categorize the information into themes. A theme captures similar ideas that, when looked at together, can be used to formulate an objective. For instance, if three different pre-work responses have statements about achieving a certain sales level, but each individual stated different figures, you would establish a potential sales goal as a theme. The next step in the process would require participants to meet to discuss the appropriate sales goal. For now, simply gather the data and organize it for an upcoming meeting on business objectives.

**Draft Potential Top Business Objectives**

Using the input gathered from leaders and the themes you categorized, draft potential high-level macro objectives. For each macro, document a more detailed micro objective that describes what will be achieved and by when (milestones).



# Guide: Top Business Objectives

## Part 3: Capturing Top Business Objectives

Set up a strategic planning session with two to four leaders in your company. In the meeting, share the success of the pre-work (the macro and micro objectives you developed in Parts 1 and 2). Then have everyone vote to determine which objectives are the most important. Go through each objective to brainstorm action areas and list and prioritize impact measures. The template below has descriptions of what each section should entail. A blank template to use during your planning session can be found on page 7 of this document.

### Top Business Objectives for [COMPANY]

**Objective 1:** This is the macro objective you are going to brainstorm.

**Enter a short description (micro objective) below.**

#### Actions and In-process Milestones

1. This is where you and the other participants document the actions required to hit the objective/key milestones.
2. These action areas should provide detailed descriptions of the activities required to hit the objectives.
3. Allow ample time in the planning session for brainstorming ideas for action items. Gather ideas, discuss, and document.
4. Make note of any action areas that should be considered In-process milestones (observable milestones you want to hit along the way to achieving the objective).

#### Expected Impacts

- Once the action areas are identified, make a list of potential impacts that achieving the objective will have on your company.

#### Potential Measurement

- Here is where you list potential impact measures. Impact measures are tangible performance indicators such as productivity, cost-savings, bottom-line performance improvements, top-line customer growth, and process enhancements.
- Some impact measures are easy to talk about, yet costly and difficult to measure. Make sure to prioritize the potential measures based on a “nice-to-know” and “need-to-know” basis.
- Be rational and logical when thinking through potential measures.

The following page contains a blank template for you to use when building macro and micro objectives and documenting actions, impacts, and measures.



## Top Business Objectives

### Objective 1:

#### **Actions and In-process Milestones**

*What actions are required to hit the objective/key milestone?*

- 1.
- 2.
- 3.
- 4.
- 5.

#### **Expected Impacts**

*What will achieving the objective lead to?*

- 
- 
- 
- 
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#### **Measurement Potential**

*How will we measure whether we are on course to hit the objective in the allotted time?*

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# Guide to Top Business Objectives

## Part 4: **Creating an Action Plan and Tracking Progress**

Use this template to assign owners and dates to the Action Steps captured during the strategic planning session.

<b>The Objective:</b>			
Today's Date:		Target Objective Completion Date:	
<b>Action Step</b>		<b>Owner</b>	<b>Timing</b>
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

**Impacts:**

**Key Measures:**



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**COMMENTS? SUGGESTIONS?**

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