**Superstar Super-Charger**

***A worksheet for articulating Vision, Mission and Outcomes.***

*For the wisdom behind this tool, go to*

A Shared Future: the Superstar Super-charger.

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| **Vision.**  Be succinct. Think long-term, broad, inspirational. |
| **Prime the pump.** Without thinking too much, just write the answers to these questions right off the top of your head to get your imagination going: |
| 1. What drove you to build your business? |
| 1. How do you want your clients to see you? |
| 1. Why do you do what you do for them? |
| 1. How are the most successful firms in your industry positioned? |

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| **Components.** You may want to include specifics in your vision statement. |
| 1. What is your industry? |
| 1. Who are your ideal clients? |
| 1. Are they concentrated in a specific demographic or profession? *(Families, business-owners, widows, LGBT, trust-fund babies…)* |
| 1. Would you consider yourself a specialist in their particular challenges and needs? Describe: |
| 1. How are the most successful firms in your industry positioned? |

Sample financial services firm vision: ***“We are the most referable financial planning firm for the leaders of the fastest growing companies in Sunville.”***

Sample consumer products vision([Avon](http://avoncompany.com/aboutavon/index.html)):***"to be the company that best understands and satisfies the product, service and self-fulfillment needs of women – globally."***

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| **Mission.**  Think in terms of how you will achieve your vision.  What do you need to be focused on to achieve it? |
| **Prime the pump.** Off the top of your head… |
| 1. What type of work do you do? |
| 1. What do you need to deliver for your vision to become reality? |
| 1. For whom do you do it? |
| * 1. Do they have a particular quality?   *(Busy, successful, philanthropic…)* |
| * 1. What makes you more capable than others to serve this client? |
| * 1. How will your service change your client’s life? |
| 1. What makes you different in your industry? |
| 1. You may want to include how you serve your employees.    1. What is your company culture like? |
| * 1. What are the most important things you do to help your employees be their best? |

Sample financial services firm mission statement:

***“By anticipating their every need, and providing solutions that leverage their efforts and maximize their time and money, we are the most essential financial partner for successful business owners.”***

You can add more: ***“We are so effective at what we do for clients because of our collaborative, respectful, and rewarding environment.”***

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| **Role Missions.**  Think about how this role contributes to the firm mission. It could be multiple sentences for each role. Each team member should be able to see easily how their performance affects the firm’s success. |
| **Prime the pump.** Off the top of your head… |
| 1. Why does this position exist? |
| 1. What should this person be striving for as they do their job? |
| 1. Whom does this role serve: clients, leadership or teammates? |
| 1. How will their condition be improved by what this role accomplishes? |
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Role Mission samples for a financial service firm:

**“Deliver client-pleasing service, such that clients are enthused to tell their friends.”**

***“To continuously discover the most effective planning opportunities to maximize my client’s freedom and financial position in every area of their business and personal life.”***

***“To deliver value in every professional relationship: clients, strategic partners, colleagues.”***

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| **Outcomes.**  Create an outcome-oriented mindset. Activity should not be mistaken for results. It’s often best to include the role owner in writing the outcomes to maximize ownership and commitment.  Be bold and get SMART: Specific, Measurable, Achievable, Realistic and Time-based. Missions can change; this should be an evolving document. |
| 1. What goals will achieve this role’s mission? Think of quantitative figures: deadlines, timelines, limitations, minimums. |
| 1. If this person is wildly successful in this role, specifically what will take place and how will you measure it? |

***“Work closely with each client’s CPA to anticipate timely tax reduction opportunities before the end of their fiscal year by touching base 2x a year.”***

***“Keep the leader’s calendar sane and conflict-free, minimizing no-shows, and maximizing appropriate expectations for all parties in every meeting.”***

***“Every client receives proactive personal contact from our team at least once a month.”***

**“Clients can always get attention immediately during business hours.”**