**The Team Success Navigator**

**A Tool for Hiring, Retention, and Team Engagement**

***Going Beyond the Job Description***

*Concepts and ideas are adapted from Who,*

*By Geoff Smart and Randy Street.*

*Who presents the “A” Method for Hiring. based on interviews with thousands of employers, the A Method forces you to focus on the pivot point that drives your firm’s success: making sure you have the right people on board.*

*For the wisdom behind this tool, go to The No Nonsense Way to Hire A Players: The Scorecard* and *The No Nonsense Way to Hire A Players: The Interview*

**Purpose For Hiring:**

* Makes your hiring strategic and intentional, and sets clear expectations for the new hire.
* Helps you hire in alignment with firm values and requirements for success.
* Provides benchmarks to measure performance

**Purpose For Existing Team:**

* As a Team tool, clarifies for everyone the specific outcomes each is striving toward.
* If using with current team members, provides opportunity to evaluate and create alignment among existing roles, their respective missions, the firm’s current direction, and your current people.
* Provides benchmarks to measure performance

**Once you customize each section below, delete the explanations and prompts. Start with articulating your firm’s mission. If you have not yet nailed down a vision, a mission for the firm, and missions for each role, there is an entire tool devoted to helping you do that:** [**the Superstar Super-Charger**](http://media.wix.com/ugd/ecb800_76db80c8015f467cb8115de9274da0b6.docx?dn=Superstar%20Supercharger%20Worksheet%20for%20Vision%2C%20Missions%20and%20Outcomes.docx)**.**

|  |  |
| --- | --- |
| **Role:** | |
| **Candidate/Team Member:** | |
| **Firm Vision and Mission:** You want to align everyone with a purpose that is bigger than each individual. There is more cohesion and commitment when one feels that what they do is meaningful. These should be reflected in your business plan. What is your vision for the future of the firm? What is the “why” behind what you do for clients? And what is your mission to get there? If you have trouble writing this, think about your differentiation – why you do what you do, and how you change people’s lives. This section is identical on everyone’s Navigator.  “If you are working on something exciting that you really care about, you don’t have to be pushed. The vision pulls you.” – Steve Jobs | |
| **Mission for the Role:** Why does this position exist? This should*not*be a list of responsibilities, rather – a few sentences that describe what this person should be striving for as they do their job. In Outcomes you can get specific about “Clients can always get attention immediately during business hours” – but in the Mission, it’s more like “delivering excellent client service.” There should be perceivable alignment between the Firm and Role missions. And missions change; this should be an evolving document. | |
| **Outcomes: 8-10** | **Grade: A, B, C** |
| Specific, Measurable, Achievable, Realistic and Time-based (SMART) outcomes that are required to succeed in this role. E.g. “Every client is contacted by our team proactively at least once a month.” Set bold outcomes that help your firm achieve bold goals. |  |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| 8 |  |
| 9 |  |
| 10 |  |

|  |  |
| --- | --- |
| **Competencies: 5-7 (see examples below)** | **Grade: A, B, C** |
| *What competencies are required to excel in this job? Is “flexibility” (due to frequently changing conditions) important? Or perhaps, “consistency” the ability to follow and track processes in the same way every time to assure quality service? List as many as you think are critical to this position, but be cautious you don’t dilute the importance of your top picks by listing too many.* |  |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| **Values: 5-7 (see examples below)** | **Grade: A, B, C** |
| What are your values? What are the firm’s values? What words describe your non-negotiable priorities, culture, and core fundamental driving forces for how you operate? This section is identical on everyone’s Navigator. |  |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |

**Competencies and Values Examples**

*Can be overlapping*

|  |  |  |  |
| --- | --- | --- | --- |
| **Role Competencies** are what is required to achieve outcomes. | | **Firm Values** should apply to every role. | |
| Detail-oriented | Excellent Communicator, written & spoken | Altruism | Tolerance |
| Aggressive | Quality | Professionalism |
| Punctual | Integrity | Perseverance |
| Outspoken | Client-focused | Humility | Learning |
| High-standards-oriented | High emotional intelligence | Diligence | Independence |
| Innovation | Confidentiality |
| Competitive | Professional | Loyalty | Ambition |
| Persistent | Resourceful | Health | Harmony |
| Efficient | Articulate | Accountability | Openness |
| Organized | Conscientious | Client-focus | Generosity |
| Proactive | Respectful | Excellence | Hard Work |
| Collaborative | Coachable | Enjoyment/Fun | Teamwork |
| Assertive | Independent | Positivity | Equality |
| Consistent | Disciplined | Collaboration | Service |
| Calm | Personable | Conscientiousness | Security |
| Active listener | Optimistic | Enthusiasm | Passion |
| Creative | Confident | Reliability | Stewardship |
| Curious | Decisive | Respect | Courage |
| Self-motivated | Results-oriented | Growth-oriented | Compassion |
| Communicative | Innovative | Tradition | Accuracy |
| Manager | Strategic | Progress | Ambition |
| Leader | Analytical | Pride | Diversity |
| Commitment-oriented | Achievement-oriented | Security | Continuous Improvement |
| Supportive | Influential | Social Activism | Empowerment |
| Fast learner | Empathetic |  |  |
| Problem-solver | Flexible/Adaptable |  |  |
| ***Add your own…*** | | | |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |