Rhino Consulting and Coaching LLC

BREAK THROUGH THE BARRIERS

Strategicish Planning

Simple frameworks for complicated work

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Owner & Founder | Leadership & Communication Coach

The first workshop gave you clarity about yourself.

The second workshop will give you clarity about your direction.

A ***value statement*** *tells people who you are.*

A ***strategic plan*** *determines who you'll become* atd MASTER TRAINER

atd CERTIFICATE NEEDS ASSESSMENT

D i C S

Meet your facilitator

RHINO CONSULTING & COACHING LLC

Break through the Barriers

Ryan is a high-energy former financial industry executive, certified master trainer and dynamic coach dedicated to organizational growth through employee development.

Through an award-winning career spanning three decades while leading sales, service, and operations and generating billions in revenue, Ryan has found a special mix in blending education, motivation, and accountability.

With over 60,000 hours of leadership experience, he is passionate about helping teams and individuals break through barriers to achieve their highest-level results while improving their job satisfaction.

Workshop Objectives

Enlist	the perspective that goal planning is easier than you thought
Identify	What clear goals are
Learn	How to identify and prioritize the requirements that need to be true to achieve your goals
Leave	With the right tactics and timelines to start action immediately!

Goal Planning is no different for the **High Schooler** who wants to **buy a car**, and the **CEO** who wants to **double company revenue.**

Strategic Planning = Goal Planning

1. Clearly defined **Goals** | Desires
2. Realistic **Timelines**
3. **Requirements** that must be met to achieve the goal
4. Actionable **Tactics** to work towards the requirements

What do I want → What must be true → What am I going to do about it

Strategic Planning Worksheet

90 Days "Now"	Goal	Requirements	Tactics
		1	R1
		2	R1
			R2
			R2

12 Months "Soon"	Goal	Requirements	Tactics
		1	R1
		2	R1
			R2
			R2

5 Years "the Future"	Goal	Requirements	Tactics
		1	R1
		2	R1
			R2
			R2

Example: 12 Months	*Goal*	*Requirements*	*Tactics*
	Buy a rental house in a good neighborhood	*1. Have $12,000 for down payment*	*R1. Save $500 e/o week*
		2. Select the right property	*R2. Research Neighborhoods*
			R2. Stay active on listing sites
			R2. Attend community meetings

HORIZON	Your timeline to have what you want. 90 days is now, 12 months is soon, 3 years is what you want normal to look like, 5 years is the future
GOAL	What you want to have, or have achieved
REQUIREMENT	What needs to be true in order to achieve the goal, what are the components of the goal
TACTICS	What are the specific activities needed to meet the requirements of the goal, who, what, when, where, and how

TIMELINES

Set smart timelines to reduce frustration and build milestones to work towards

90 DAYS (Right Now!)

- Things I can do tomorrow and see progress
- Use tools already in place in more efficient ways

1 YEAR (Soon)

- A year goes by faster than you think, what is realistic
- What knowledge do I have or could get quickly
- What resources do I have or could I start building

3 YEARS (Up to Speed)

- This is what I'd like my company or job to look like "once things are in place"
- This allows time for resource building, knowledge improvement, and some trial & error

5 YEARS (Long Term)

- The vision of the future
- What I would like to see happen in my company/job/career

What is a GOAL

A goal is simply a clear picture of something you want to achieve in the future

- Buy a car in the next 12 months
- Increase company revenue by $60 million
- Graduate College Debt Free
- Acquire another smaller company
- Buy our first home next year
- Open 3 new branches
- Lose 20lbs by Christmas
- Improve customer satisfaction by 20%

What is a GOAL

College Student: Graduate College Debt Free

CEO: Acquire another smaller company

Both Require:

- Financial Planning
- Resource Management
- Timelines
- Daily Decisions

What is a GOAL

College Student: Buy our first home next year

Bank President: Open 3 new branches next year

Both Require:

- What resources do we need
- What happens first, then second
- Who is responsible for each step

What is a GOAL

Jimmy: Lose 20lbs by Christmas

COO: Improve customer satisfaction by 20%

Both Require:

- What needs to be true
- What daily behaviors create those conditions
- Neither answer can simply be “try harder”

REQUIREMENTS

What must be true in order for my Goal to be achieved

Goal – **Buy my first car in the next 12 months**

What must be true to achieve this goal?

- Down payment Money
- Identify the right car for you
- License
- Insurance

Goal – **Increase Bank Revenue by $60mm**

What must be true to achieve this goal?

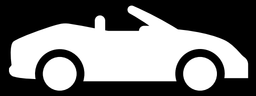
- Acquire More Customers
- Increase Revenue per customer
- Build a team that can handle the growth
- Maintain safe, profitable growth

TACTICS

Who, Want, and How will we do what is needed to meet the requirements of our goals?

Goal: Buy my first car in the next 12 months
Requirement: Get my permit/license

Tactics:
- Study for 2 hours per week until I'm through the manual twice
- Take a practice test online
- Schedule my written test to get my permit
- Get practice hours in with my parents
- Take the driving exam



Goal: Buy my first car in the next 12 months
Requirement: Identify the right car for you

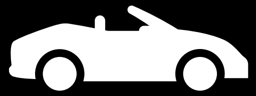
Tactics:
- Read 4 car reviews per week, look them up online and figure out price
- Connect with 1 local car dealership per month to ask questions and learn how they find cars to sell
- Test drive 2 cars per month

TACTICS

Who, Want, and How will we do what is needed to meet the requirements of our goals?

Goal: Buy my first car in the next 12 months
Requirement: Down Payment Money

Tactics:
- Save $200 per paycheck
- Earn money outside of my job, mow lawns, household chores, work for grandpa



Goal: Buy my first car in the next 12 months
Requirement: Get car insurance

Tactics:
- Research 4 insurance companies, 2 national, 2 local
- Get 1 quote from 1 national carrier, and 1 local agent
- Set aside enough money to bind the policy when I buy the car

Notice - *None of these tactics accomplish the goal on their own, they simply move us closer to meeting one requirement*

TACTICS

Who, Want, and How will we do what is needed to meet the requirements of our goals?

Goal: Increase Bank Revenue by $60mm
Requirement: Acquire More Customers

Tactics:
- Open two new branch locations in high-growth markets.
- Increase digital marketing by 30%.
- Launch referral programs for both consumer and commercial clients.
- Develop strategic partnerships with local businesses and community organizations

Goal: Increase Bank Revenue by $60mm
Requirement: Increase Revenue per customer

Tactics:
- Train bankers in consultative selling and financial needs conversations.
- Increase cross-selling of loans, deposits, treasury management, investments, and insurance.
- Conduct annual financial reviews with top customers.
- Introduce new products that better meet customer needs.

TACTICS

Who, Want, and How will we do what is needed to meet the requirements of our goals?

Goal: **Increase Bank Revenue by $60mm**
Requirement: Build a team that can handle the growth

Tactics:

- Hire experienced commercial lenders and relationship managers.
- Create leadership development programs for future managers.
- Improve employee engagement and retention.
- Align incentive plans with growth objectives.

Goal: **Increase Bank Revenue by $60mm**
Requirement: Maintain safe, profitable growth

Tactics:

- Invest in technology and automation to improve efficiency.
- Monitor credit quality and lending risk.
- Improve operational processes to reduce costs.
- Track key performance indicators monthly and adjust strategy as needed.

Comparison

Goal: **Buy my first car in the next 12 months**

Requirements:
1. Down payment Money
2. Identify the right car for you
3. License
4. Insurance

Tactics:
What are the things to do to work towards meeting each requirement

Goal: **Increase Bank Revenue by $60mm**

Requirements:
1. Acquire More Customers
2. Increase Revenue per customer
3. Build a team that can handle the growth
4. Maintain safe, profitable growth

Tactics:
What are the things to do to work towards meeting each requirement

Did the process change?

What did change?

The only thing that changed was the SIZE of the goal.

Exercise:

Your strategic goal

Sample Banking GOALs

Individual Contributor (Sales/Production)
Increase personal loan and deposit production by 20% in the next 12 months while maintaining a 90% customer satisfaction rating

Technical Professional (Operations/Compliance)
Reduce processing errors by 25% and decrease average turnaround time by 20% for my primary responsibilities over the next 12 months

Emerging Leader Goal
Become the leader people seek out by consistently building trust, creating clarity, and developing others in the next 3 years

The "WHAT" you want, clearly defined, time-bound, and meaningful enough to **DRIVE ACTION!**

Strategic Planning Worksheet

Goal (what do I want, and when)
Requirements (what needs to be true to have achieved the goal)
1
2
3
4
5
Tactics (who, what, where, when, how)
1
2
3
4
5

Workshop Summary

Goals

goal planning concepts are the same for teens and CEOs

What do you want, when do you want it

Requirements

What needs to be true to achieve your goals

Tactics

What can I do immediately to take steps towards meeting the requirements of my goals

Goals don't happen just because we want then, they happen because we create the conditions that make them possible!

Q&A

Questions & Answers

Rhino Consulting and Coaching LLC

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