



SmartTribes®
INSTITUTE
fuel your tribe

LEADERSHIP PLAYBOOK

Increasing Accountability And
Insuring Goals Are Met Kit

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Needle Mover Tutorial

In my decades of building highly-profitable businesses from the ground up, I find that many executives struggle to attain the necessary focus to raise their companies to the next level. The key ingredient is identifying “needle movers”, business, social, and personal benchmarks that can work to unleash the full potential of companies in any and every industry. Our tutorial focuses on the essential characteristics and practical application of these “needle movers” to *your* business, so that as an executive you can take full responsibility for the future success of your company.

What Will Move The Needle?

We all need help identifying the *three* activities to focus on RIGHT NOW that “move the needle” – activities that move your business forward from zero to 10 miles per hour, or from 10 to 40 mph, or from 40 to 90 mph. The process involves distilling your business to its essential mechanics. Perhaps to move your business forward you need to: Generate More Sales Leads, Close More Key Sales Opportunities, or Train Your Team To Be Self-Sufficient. At any given time, everyone on your team should have needle movers that they are focusing on and directly reporting to higher authority. The reason I encourage you to distill your needle movers to only three is because each of these activities will have numerous sub-activities beneath them, which will leave plenty of work to be done!

I prefer the term Needle Mover as opposed to Goal. Goals are binary—you achieve them and feel great or you don’t and feel lousy. No matter the level of success on a particular activity, A Needle Mover is a given RESULT that will have a significant impact on the success of your business. I’ll show you later how to break down this RESULT into ACTIONS. Once you determine your Needle Movers and create and follow a plan to achieve them you’ll see daily, weekly, monthly, quarterly and annual results. Tangible results keep you excited and they build and maintain your MOMENTUM.

For now, I want us to focus on the specific RESULTS you want, and how to set a TARGET, MINIMUM and MIND BLOWER for each Needle Mover. The TARGET is what you want, the MINIMUM is what you are willing to accept, the MIND BLOWER is what would absolutely Rock Your World!

How do you fit in to all of this? At the end of this tutorial, you will have annual Needle Movers designed to maintain focus on your ultimate vision, as well as monthly and quarterly Movers to keep you accountable and on track to create the long-term success you are capable of. Let us look at an example of Needle Movers in action!

How to Rock Steve's World

Steve has a consumer retail product that he sells directly from his web site, through hotels, and through gift shops. His revenue has been a steady \$33mil per year, but last year it dipped down to \$31mil. He wants to reach \$35mil this year and will have to start managing by NEEDLE MOVERS to make that happen. Here are his annual NEEDLE MOVERS:

- 1) \$35mil in revenue (Target: \$35mil, Min: \$32mil, MB: \$40mil+)
- 2) Weekends off (Target: 75% off, Min: 50% off, MB: ALL weekends off for the year)
- 3) Cut costs by 20% (Target: 20%, Min: 15%, MB: 25%+)

However, if Steve doesn't take them further and drill down on how exactly he will achieve those Needle Movers, he may as well just set goals—which often are simply vague, unaccountable *desires*.

Steve may first want to drill down on what it would take to reach some of his annual Needle Movers:

- 1) For \$35mil in Revenue→ he'd want to add 20+ new retail channels, increase online sales by 20%+, recruit 5 new pay for performance sales people, forge alliances with 10+ companies with complementary products for bi-directional web sales, add coverage in 15+ additional catalogs
- 2) For Weekends Off→ he'll want to train up his team to be self-managed, delegate more to his office manager, determine what he can defer and ditch entirely
- 3) To Cut Costs by 20%→ he'll want to work new terms with his existing or find new manufacturing sources, streamline internal processes and offering clients an online self serve helpdesk, use SOPs across all departments.

Now that Steve understands some of how his annual Needle Movers will happen, he can dive into laying out monthly Needle Movers to track his progress. See how the process starts this way? First, you determine what *RESULTS* will dramatically change your business and life, then *immediately* list specific ideas to achieve each result.

Drilling Down Into Details

As you start to drill down on your needle movers, you start understanding how to distribute the work across your executive team in the coming weeks, months, and years.

So let's go a step further with Steve... because certain things **NEED TO HAPPEN** for him to achieve his annual needle movers.

For \$35mil in Revenue→ he may want to re-order what he wants to achieve when, since some results will depend on others. He may need to achieve them in this order:

In the first month he may want to: recruit 5 new pay for performance sales people **SO HE CAN** add 20+ new retail channels, **THEN** in the second month he can: forge alliances with 10+ companies with complementary products for bi-directional web sales and 15+ additional catalogs **WHICH WILL LEAD TO HIS RESULT OF** increasing online sales by 20%+ through the year. And yes—he needs to quantify what amount of revenue he wants from his various channels: online sales, alliances, direct/telephone sales.

For Weekends Off→ In the first month he'll want to look at what he can delegate, defer until later, or ultimately ditch—decide to not do at all. **THEN** in month 1 or 2 he can delegate more to his office manager (hopefully most of current weekend workload) and **NEXT HE CAN TACKLE** training up his team to be self-managed, which will take between 3 and 6 months, depending on how accountable and self-managed his team currently is.

To Cut Costs by 20%→ in the first month he could start with working on new terms with existing or find new manufacturing sources, **THEN/OR IN PARALLEL IF HIS OFFICE MANAGER DOES THIS** he could start to: use SOPs (standard operating procedures) across all departments **WHICH WILL LEAD TO** streamlining internal processes and offering clients an online self serve helpdesk which will happen within 3 months or so. SOPS, standard operating procedures, take time to write, but as you explain and document what steps are necessary to process an order, put on an event, whatever your business does, you'll find you operate far more efficiently and quality/consistency of work will increase.

See how key it is to have specific and measurable needle movers? And see how you can have annual, quarterly, monthly needle movers?

Here's a template to use to identify and track your needle moving RESULTS. Grab a piece of paper and place it lengthwise (or in "landscape" mode if you're on a PC) and create 4 columns. The first column is labeled RESULT (this is *one* of your needle movers), the second column is labeled ACTIONS (these are the actions to take to achieve the specific needle moving RESULT), the third column is labeled OWNER (this is the person who is accountable for a given ACTION) and the fourth column is RESOURCES (these are the resources such as web sites, software and other tools or people to help an OWNER complete a given ACTION.)

So, left to right the columns are:

RESULT ACTIONS OWNER RESOURCES

A given RESULT will have usually 3-10 ACTIONS, which may have different OWNERS for each ACTION. There may or may not be RESOURCES for a given ACTION.

Here are a few examples of needle movers in the above format:

Needle Movers For The Month

Result	Actions	Owner	Resources
Generate 1,000 sales leads this month Target: 1,000 Min: 750 MB: 1,500+	Start a Facebook group, invite all friends to invite their friends	Sue Smith	
	Deliver 4 teleseminars	Joe Blow	Use InstantTeleseminar from Xiosoft.com
	Sign 10 joint venture partners, set up as affiliates	Sue Smith	MyMarketingCart.com for affiliate management
	Distribute 3 articles/week for the whole month	Joe Blow	Ezinearticles.com and Google for other article distribution sites

Result	Actions	Owner	Resources
	Finish free audio gift and upload to opt-in page	Elvis Presley	Sony SoundForge recording software, Audio Technica AT2020 USB microphone, box.net account to upload to webmaster
Have client care team fully trained up by month end Target: 6/30 Min: 7/15 MB: 6/20	Write remaining 5 Standard Operating Procedures	Elvis Presley	SOP Word template
	Load Frequently Asked Questions into Kayako.com	Sue Smith	Pull from old web site
	Schedule weekly status/training calls	Elvis Presley	Google calendar

Get the idea? It's all about determining the key results that you want to achieve, listing all the actions that must take place to achieve that result, and finally assigning ownership and resources to each Needle Mover.

The next time you start to lose focus on the direction and growing profitability of your company, count on your Needle Movers to shed light on where your energy and time must be allocated. As a result, you will see a significant increase in the productivity and focus of you and your executive team. You have always had the power to create high-level success. Now having completed this Needle Mover Tutorial, you have the tools of the trade to manifest that prosperity in your present reality!

Needle Mover Examples

George's Top 3 Needle Movers for the Year:

Needle Mover #1: Reach \$12mil in revenue

Target: \$12mil

Minimum: \$10mil

Mind Blower: \$14mil+

Needle Mover #2: Spend 80% of time on core expertise

Target: 80%

Minimum: 50%

Mind Blower: 100%

Needle Mover #3: Have a sales pipeline of \$8mil heading into the new year

Target: \$8mil

Minimum: \$7mil

Mind Blower: \$10mil

Carol's Top 3 Needle Movers for the Year:

Needle Mover #1: Build a vibrant list of 10,000+ followers/fans

Target: 10,000

Minimum: 7,000

Mind Blower: 20,000+

Needle Mover #2: Develop Product Path and launch 4 products

Target: 4

Minimum: 2

Mind Blower: 6

Needle Mover #3: Develop and launch sales and marketing strategy (to get \$5mil annual revenue)

Target: Within 30 DAYS

Minimum: Within 45 DAYS

Mind Blower: Within 15 DAYS

Steve's Top 3 Needle Movers for the Year:

Needle Mover #1: \$35mil in revenue

Target: \$35mil

Minimum: \$32mil

Mind Blower: \$40mil+

What Needs to Happen to Achieve This Result: Steve may want to re-order what he wants to achieve when, since some results will depend on others. He may need to achieve them in this order:

In the first month he may want to: recruit 5 new pay for performance sales people **SO HE CAN** add 20+ new retail channels, **THEN** in the second month he can: forge alliances with 10+ companies with complementary products for bi-directional web sales and 15+ additional catalogs **WHICH WILL LEAD TO HIS RESULT OF** increasing online sales by 20%+ through the year. And yes—he needs to quantify what amount of revenue he wants from his various channels: online sales, alliances, direct/telephone sales.

Needle Mover #2: Weekends off

Target: 75% off

Minimum: 50% off

Mind Blower: ALL weekends off for the year!

What Needs to Happen to Achieve This Result: In the first month he'll want to look at what he can delegate, defer until later, or ultimately ditch—decide to not do at all. **THEN** in month 1 or 2 he can delegate more to his office manager (hopefully most of current weekend workload) and **NEXT HE CAN TACKLE** training up his team to be self-managed, which will take between 3 and 6 months, depending on how accountable and self-managed his team currently is.

Needle Mover #3: Cut costs by 20%

Target: 20%

Minimum: 15%

Mind Blower: 25%+

What Needs to Happen to Achieve This Result: in the first month he could start with working on new terms with existing or find new manufacturing sources, **THEN/OR IN PARALLEL IF HIS OFFICE MANAGER DOES THIS** he could start to: use SOPs (standard operating procedures) across all departments **WHICH WILL LEAD TO** streamlining internal processes and offering clients an online self serve helpdesk which will happen within 3 months or so. SOPS, standard operating procedures take time to write, but as you explain and document what steps are necessary to process an order, put on an event, whatever your business does, you'll find you operate far more efficiently.

Needle Mover Worksheet

Top 3 Needle Movers for the Year _____:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Top 3 Needle Movers for the Month of _____:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Top 3 Needle Movers for the Month of _____:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Needle Mover:

Target:

Minimum:

Mind Blower:

Weekly Status Template (Begin Month)

Completed Week of (DATE)/Weekly Win (EXAMPLE: MM/DD/YY)	Not Completed Last Week /Why	Key Projects Week of (COMING WEEK) (EXAMPLE: MM/DD/YY)	Annual Key Performance Indicators (KPIs)/Previous Month Results	(CURRENT MONTH) Needle Mover Status (EXAMPLE: Month Year)
TEAM MEMBER #1 (EXAMPLE: VP SALES)				
<ul style="list-style-type: none"> • Design Retailer sales kit • Meet with Development to consolidate product lines • Meet with Finance re: DSO reduction • Strategic planning offsite • 4 client meetings re: 2015 orders <p>Weekly Win:</p> <ul style="list-style-type: none"> • 2 new Strategic Accounts on-boarded! 	<ul style="list-style-type: none"> • Interview sales intern/under estimated time required to on-board new accounts 	<ul style="list-style-type: none"> • Meet with Client Care to design Client Service Rep up-sell/down-sell/cross-sell scripts • Meet with Inventory team to set fill rates, turn, aging rates for 2015 • Train new Account Manager in sales process • 5 client meetings re: 2015 orders 	<ul style="list-style-type: none"> • Total Revenue • Gross Margin • Increase in Rep Revenue <p><u>SEPTEMBER RESULTS</u></p> <p><u>Monthly Revenue: \$752k</u></p> <p>T: \$750K Min: \$600k MB: \$900k+</p> <p><u>Monthly Gross Margin: 7.5%</u></p> <p>T: 8% Min: 6.5% MB: 10%</p> <p><u>New Strategic Accounts: 4</u></p> <p>T: 4 Min: 3 MB: 5</p>	<p><u>Monthly Revenue</u></p> <p>T: \$750K Min: \$600k MB: \$900k+</p> <p><u>Monthly Gross Margin</u></p> <p>T: 8% Min: 6.5% MB: 10%</p> <p><u>2011 Rep Quotas, Sales Process, Training Dates Set</u></p> <p>T: 10/20 Min: 10/29 MB: 10/15</p>

TEAM MEMBER #2 NAME				
TEAM MEMBER #3 NAME				
TEAM MEMBER #4 NAME				
TEAM MEMBER #5 NAME				

Weekly Status Template (End Month)

Completed Week of (DATE)/Weekly Win (EXAMPLE: MM/DD/YY)	Not Completed Last Week /Why	Key Projects Week of (COMING WEEK) (EXAMPLE: MM/DD/YY)	Annual Key Performance Indicators (KPIs)/Previous Month Results	(CURRENT MONTH) Needle Mover Status (EXAMPLE: Month, Year)
TEAM MEMBER #1 (EXAMPLE: VP SALES)				
<ul style="list-style-type: none"> • Approved final Retailer sales kit • 4 client meetings re: 2015 orders • Finished Client Service Rep up-sell/down-sell/cross-sell scripts • Finished CSR, Rep, Retailer sales SOPs <p>Weekly Win:</p> <ul style="list-style-type: none"> • 4 new Reps on-boarded 	<ul style="list-style-type: none"> • Nada 	<ul style="list-style-type: none"> • Train 10 Retailers in sales kit • Set CSR quotas with Client Care • Design monthly communication to Reps, CSRs, Retailers, Key Accounts with Marketing • Finalize 2015 Marketing Promo Plan • 2 client meetings re: 2015 orders 	<ul style="list-style-type: none"> • Total Revenue • Gross Margin • Increase in Rep Revenue <p><u>OCTOBER RESULTS</u></p> <p><u>Monthly Revenue:</u> \$770k</p> <p>T: \$750K Min: \$600k MB: \$900k+</p> <p><u>Monthly Gross Margin:</u> 7.8%</p> <p>T: 8% Min: 6.5% MB: 10%</p> <p><u>2015 Rep Quotas, Sales Process, Training Dates Set:</u> 10/26</p> <p>T: 10/20 Min: 10/29 MB: 10/15</p>	<p><i>(Note changes to bolded items due to past month's performance)</i></p> <p><u>Monthly Revenue:</u></p> <p>T: \$800K Min: \$750k MB: \$1mil+</p> <p><u>Monthly Gross Margin:</u></p> <p>T: 8.25% Min: 7.5% MB: 10%</p> <p><u>2015 CSR Quotas, Sales Process, Training Dates Set:</u></p> <p>T: 11/24 Min: 11/30 MB: 11/17</p>

TEAM MEMBER #2 NAME				
TEAM MEMBER #3 NAME				
TEAM MEMBER #4 NAME				
TEAM MEMBER #5 NAME				