

Aims Worksheet

VISTAGE

Private advisory boards for CEOs,
executives and business owners.

Name:

Date:

Consider All The AIs

Be clear. Be inspiring. Be brief.
— Lisa Dolin

*"I achieved my goal but not my aim."
That happens a lot. We honestly
translate aims to goals. And then
we do stupid things in the name
of the goal that get in the way of the
aim. We forget the aim sometimes
and put the goal in its place.*
— W. Edwards Deming

*Consider all the "alls": relational,
financial, intellectual, physical, spiritual.*
— Doug Lunne

*They all must be pursued.
Ignore one and another suffers.*
— Chris Paisley

*Goals are useful only inasmuch
as they set direction.*
— Dr. Srikumar Rao

Aim of This Document:

To help us assess progress, revise our aims, and recommit to our intentions.

Method:

Print several copies. Complete it once. Go quickly. Be hasty. Ten minutes.

A few days later, start fresh. Do not revise. Don't look at your earlier draft(s). Start over.

Repeat and repeat. You'll be surprised how ideas develop. You'll pursue the important parts.

For more information and encouragement, visit:

- artieisaac.com/AimsSetting — for a description of how to develop aims (or goals).
- artieisaac.com/AimsWorksheet — for a digital version of this worksheet you can share.
- artieisaac@gmail.com — ask anything!

1. Review & Assessment (of the current year)

Outline, then present to a peer. Keep it short; don't overfill the box.

A. What were your organization's most significant and satisfying accomplishments?

B. What were your organization's most significant and frustrating disappointments?

C. What were your most significant and satisfying professional accomplishments?

D. What were your most significant and frustrating professional disappointments?

E. What were your most significant and satisfying personal accomplishments?

F. What were your most significant and frustrating personal disappointments?

2. Self-Reflection (of the current year)

Outline, then present to a peer. Keep it short; don't overfill the box.

G. What behaviors must you continue — and which of your values served you best?

H. What behaviors would make you more effective? What evolution in your values would help?

I. What stretched your own capacity and skills? Were your values reinforced? Did they evolve?

J. What behaviors were most appreciated by others? How did your values play a role?

K. Which of your behaviors cause others needless suffering? Are your values in the way?

L. Looking back on the year, what words describe who you were being?

3. Values Check

Q: What is most important? A: Your non-negotiables. And who you want to be.

M. *What are non-negotiable for you? On what do you refuse to compromise?*

N. *What words describe who you want to be?*

4. Aims Development (going forward)

Generate many aims for you as a leader, individual, family member, citizen — not aims or goals for your enterprise. Write aims that are specific, significant, motivating, and measurable. Both quantitative and qualitative aims are fair as long as they reflect your interests and passions. (To help spark your imagination, see “Thought Starters” in the Appendix.)

O. **Relational:** *Your pursuit of these aims helps someone else pursue their aims.*

P. **Wealth:** *Beyond financial aims, these embrace the broader riches of life.*

Q. **Intellectual:** *How can you strengthen — and tickle — your brain?*

R. **Physical:** *How can you strengthen your body, lengthen your longevity, enjoy better health?*

4. Aims Development (going forward)

S. *Spiritual: How can you develop greater inner peace and reduce needless suffering?*

T. *Vistage: How you increase your Vistage Member ROI and the ROI for your Vistage peers?*

5. Aims (going forward)

Pick a single aim for each of the six areas. Think: "Going forward, what one aim would I most want to pursue?" When complete, share these with a peer.

For help, see the Aims Filters at the top of the following page.

Relational (in service to another pursuing their aim)

Wealth (might be beyond financial)

Intellectual (growth in your smarts)

Physical (health and fitness)

Spiritual (whatever this means to you)

Vistage (to increase your and others' Member ROI)

6. Pressure Testing & Discussion

For discussion with your group.

- ✓ Aims Filters:
 - Is this aim in sync with your values?
 - Do you think, "Wouldn't it be GREAT if I energetically pursued this aim!?"
 - Does this aim reflect your dreams and help define your vision of success?
 - Would pursuing this aim improve relationships at work or at home?
 - Is this aim at the highest and most meaningful level?
 - Does this aim inspire others?
 - Where does this aim lead in 5-10 years?
- ✓ For more on the topic of defining aims, see artieisaac.com/AimsSetting. Share with anyone.
- ✓ What resources are you willing to invest to pursue these aims? What competes for these same resources?
- ✓ What real-world distractions and roadblocks do you expect? How can you mitigate them?
- ✓ What are the indicated actions that you can start soon for a running start?
- ✓ How will you be more disciplined and deliberate in your pursuits? Is this more about week-in, week-out work or special events/occasions?
- ✓ What is the impact on you and others of pursuing each aim? What is the impact on you and others of NOT pursuing each aim?
- ✓ To pursue these aims, what behaviors and traditions must you maintain and what behaviors and traditions must you address and change?
- ✓ What specific actions will deliver results against these aims and which will likely be counter-productive?
- ✓ What systems and processes can you implement to reinforce and reward those behaviors:
 - Daily plan, weekly checks & monthly/quarterly reviews (plus/delta)?
 - Keep your aims sheet nearby?
 - Is there an app for that?
- ✓ How will you know when you have made progress toward each aim? (Visualize your progress toward your aims as of March, June, September, and December. What will have happened? What will you have accomplished at each mile marker?)
- ✓ How can your Vistage Group and Artie assist and support you in your pursuit of these aims? What are you seeking from these leaders? Timely advice? Accountability?
- ✓ How often do you want to update the group? Monthly or quarterly?
- ✓ Imagine making progress toward these aims. How does that feel? How will you celebrate? With whom will you celebrate?
- ✓ Are you willing to sign your name to these aims and commit today?

X

(So sign already.)

APPENDIX: Thought Starters

Business & Work Context

- ➔ How can you become a better version of yourself?
- ➔ How can you help your organization become a better version of itself?
- ➔ What do you want your reputation and long-term legacy to be?
- ➔ What really energizes you at work?
- ➔ What do you need to learn more about?
- ➔ With whom do you have essential working relationships, and what shape are they in?
- ➔ How are the needs of your customers changing, and how does your organization need to reposition itself?
- ➔ What processes are in place, or should be in place, to drive change initiatives?
- ➔ What is your organization's #1 opportunity?
- ➔ What bad news could come? Would that derail your organization?
- ➔ How is the culture and climate of your organization changing?
- ➔ How can you be a strengths-based leader to drive engagement and productivity?
- ➔ What long-term or capital investments do you need to consider?
- ➔ What major strategic decisions need to be made?
- ➔ How can you lead the thinking on those decisions?
- ➔ What is your greatest fear at work?
- ➔ What have you and your team been avoiding in the business?
- ➔ Are you really good at execution and implementation?
- ➔ Would these major strategic decisions yield notable accomplishments for your career?
- ➔ What are the demonstrated core competencies of your business?
- ➔ What are the demonstrated weaknesses of your business?
- ➔ How can you tap into your creativity and imagination (and that of your team)?
- ➔ What are your particular strengths as a CEO?
- ➔ What are your developmental areas as a CEO?
- ➔ How can you become a thought leader for your organization and your industry?
- ➔ What work relationships do you need to improve?
- ➔ What risks are you willing to take to pursue these aims?
- ➔ What data tracks these aims?
- ➔ Are you willing to create a safe yet occasionally uncomfortable environment for your people?
- ➔ In what areas do you want to be reading, writing, teaching?
- ➔ Have you outlined your options and strategies for exiting the business? Why / why not?
- ➔ What are you going to spend more time doing?
- ➔ What are you going to spend less time doing?
- ➔ How can you develop broader awareness of yourself as a leader? What standards of behavior lead to these aims?
- ➔ What pathways for action do you want to consider?
- ➔ What old-fashioned things will help you and your team pursue your aims?
- ➔ What new-fangled things will help you and your team pursue your aims?

APPENDIX: Thought Starters (continued)

Personal & Social Context

- ➔ How can you become a better version of yourself?
- ➔ What is unique about your life or situation?
- ➔ What behaviors and interactions lead to enjoyable results?
- ➔ When do you laugh and smile?
- ➔ What or who have you been avoiding?
- ➔ How can you build up a sense of security?
- ➔ What is your greatest fear?
- ➔ What might you long regret?
- ➔ How do you deal with bad news and who supports you?
- ➔ What bad habits are you going to eliminate?
- ➔ What do you want to learn?
- ➔ Fitness, Health & Wellness:
 - How can you reduce stress and your own needless suffering?
 - How can you strengthen your sleep, nutrition, exercise, energy level?
 - How might you increase the role of meditation?
 - What challenging topics might you raise with a physician, therapists, or coach?
- ➔ Family:
 - Who are most important in your life? (Rank order them.)
 - What would be possible if you protected more family time in your calendar?
 - What relationships do you want to improve, and how will you do that?
- ➔ Friends:
 - What strengthens real friendships?
 - What old friends would you like to see?
 - What new friends are appearing in your life?
- ➔ Community:
 - In what ways can you contribute to your community?
 - Where do you most want to give your time, talent, and treasure?
 - What causes do you care about that help others in need?
- ➔ Spirituality:
 - What new habits do you want to adopt to grow spiritually?
 - How could you invest in building and maintaining your ethics?
 - Do you have a moral, ethical, or intellectual community?
- ➔ Finances, personal finances:
 - What choices are you making, and by those choices what are you teaching others?
 - Do you have a financial plan and an estate plan?
 - Are your will, living will, and durable health care power of attorney up to date?
- ➔ Fun and Recreation:
 - When's the last time you just had fun without an agenda?
 - What adventures can you have in your own home, yard, and community?
 - Why not come to Yellow Springs for a hike or lunch on the patio with Artie?