



# **A Goal Without a Plan is Just a Wish!**

## **A SMART Goals Setting Deep Dive!**

---

**February 2, 2022**

Lisa Ware

Director of Sales & Business Development  
Catering by Michaels

Board Member – International Caterers  
Association



## A Goal Without a Plan is Just a Wish!

### **Why goal setting?**

-In our world, let's talk the obvious relevant reason...COVID-19 and the impact on our business and in turn our team.

-My experience with my own team

### **Harvard Business Study:**

-A Harvard business study found that 83% of the population does not have goals. 14% have a plan in mind, but are unwritten goals, 3% have goals written down. The study went on to find that of the 14% who have goals, they are 10 times more successful than those without goals and the 3% who write down are 3 times more successful than the 14%.

Fascinating! Moral of the story: Write. Them. Down.

### **Progress equals happiness:**

The value of setting goals in life cannot be overstated. In the words of Tony Robbins, "Progress equals happiness."

We need to feel like we are working towards something.

### **Goal ROI:**

-Setting goals are linked with higher motivation, self-esteem, self-confidence and autonomy.

## SMART Goals – An Introduction

### First things first...What are S.M.A.R.T. Goals?

There are a lot of definitions out there and this could be a 4-hour session, so I am streamlining. This is the language I use that works best for my team.

**S – Specific:** Be specific about what you want to accomplish. Think about this as the mission statement for your goal. Typically, this should answer all the “w” questions.

**M – Measurable:** This makes a goal more tangible because it provides a way to measure progress. This gives your goal substance. For example – increase corporate sales could be your goal. Now give it a measure – increase corporate sales by 15% over prior year. Now, you have a way to track your goal.

**A – Attainable (Achievable):** This part of your goal is meant to inspire motivation, not discouragement. Think about how to accomplish the goal and if you have the tools/skills needed. It might mean you need to develop new skills or change your attitude to make this happen or recruit help from other departments.

**R – Relevant (Realistic):** Relevance refers to focusing on something that makes sense with your broader business goals. Remember, your sales are your own business unit.

**T – Time Bound (Timely):** Anyone can set goals, but if it lacks realistic timing, chances are you are not going to succeed. Is this going to take 1 month, 1 quarter or 1 year? Set metrics around how long it will take to complete. If the goal is meant to take 6 months to achieve, it is helpful to define what should be achieved at the halfway mark or even monthly.

SMART Goals...in English this time!

# Catering by Michaels 2022

## SMART GOALS PLANNING

S

SPECIFIC

What do you want to do?

M

MEASURABLE

How will you track your progress?

A

ATTAINABLE

How will you do it?

R

RELEVANT

Is this relevant to your professional life right now?

T

TIMELY

When do you want to do it?

WHAT ARE SMART GOALS AND ARE YOUR GOALS SMART ?



## SMART Goals...we know what they are, now HOW to implement?

### **Step 1 – Identify how many SMART goals each team member will have?**

- There is no right or wrong answer here – my advice is to start small.
- When we began SMART goals – we started with 2.

### **Annual Sales SMART Goal:**

In our market, COVID-19 still a huge impact.

Here was our 2022 process:

1 – Identify as a company where we need to be in annual revenue

2 – Have each sales member provide their input on their own personal sales goals.

3 – 1:1 meeting with each salesperson to go over potential sales goals, their personal sales plans and compare numbers to company projections.

\*\*Pet Peeve – I was once a salesperson and had no say in my sales goal – I hated that! I try to lead differently.

4 – Do an analysis on current booked business, tentative business, historic annual numbers and go over as a team annual benchmarks & monthly benchmarks.

5 – In most cases, we were very close, slight compromises were made on both sides. In the end – salesperson happy & company happy! Win! Win!

6 – Write annual SMART goal language

7 – Salesperson break their annual goal into monthly goals to better track progress towards the goal

SMART Goals...we know what they are, now  
HOW to implement? Take 2!

## **Step 2 – Identify “buckets” or top-level themes for each SMART goal.**

\*\*This piece is optional –over the years I have learned my team thrives on a little bit of guidance and the “buckets” were their request to get them started on the process and headed in the right direction.

In 2022 – my team each have 5 SMART Goals in the following buckets:

### 1 – Annual Sales Goal

1a – % Increase by Sales Type

1b - % Increase by Chosen Venue

\*\*Living in a world that 1a and 1b greatly help them put intention behind how they will achieve their main sales goal!

### 2 – Relationship Development

### 3 – Dealer’s Choice

### 4 – Culture

### 5 - Personal

PAUSE! It is not too late to start SMART goal planning for 2022 – it's barely February! SMART Goals can be implemented at any time, any place or at any point in the year – there is no magic potion – you do you!

## SMART Goal Planning Timeline

August: 5 Minutes

Refresh of SMART Goals at monthly all team meeting

September: 10 Minutes

Share with team what the "buckets" for the next year will be  
Set expectation we will start 1:1 meetings in October

- Send SMART goals brainstorming template
- Send calendar hits for 1:1 meetings in early October

October: 45 Minutes per Salesperson

This is a BRAINSTORM initial meeting - no expectations for the team to come to the meeting with anything but initial ideas based on the buckets

Early November: 30 Minutes per Salesperson

Follow up 1:1 meetings. Each team member comes to meeting with their rough draft of SMART goals to review together

Mid November: Via email. 5-10 Minutes per Salesperson

2 weeks after 1:1 meeting, final draft emailed to me, minor edits if needed

December 1: Via email. 5-10 Minutes per Salesperson

Final draft approval and compensation agreements sent for following year

WHAT ARE SMART GOALS AND ARE  
YOUR GOALS SMART ?



SMART Goals...we have a plan, now when to start?



## SMART Goals...the goals are set, now what do I do?

Well, glad you asked!

The best thing about SMART goals is that it is a fool proof method to set your team on a positive path forward.

SMART goals lay out the action plan for you and your team...so the answer is simple, now all we do is follow the plan!

Once a month...30-minute Power Half Hour – SMART Goals

Helpful Tips:

- Top of the month every month
- I do the same day each month – after our Tuesday all team meeting
- Team sends me their updated SMART goal template one week prior
- Use this meeting to brainstorm future ideas & troubleshoot problems
- Do NOT use this meeting to read through the information they sent you in advance – do that on your own.
- Let them lead the meeting
- Ask probing questions...

How are things going?

What would you like to focus on this month?

Where do you need support?

How are you feeling about your goals?

Where should we put more intent?

SMART Goals...the good stuff - examples!

### Step 3: Create your SMART Goals

These are real examples from my team for 2022 SMART Goals:

#### SMART Goal 1 – Annual Sales Goal:

In 2022, annual sales goal of \$1,500,000.

MONTH	MONTHLY SALES GOAL	ACTUAL	DIFFERENCE +/-	GRAND TOTAL
JANUARY	\$10,000			
FEBRUARY	\$70,000			
MARCH	\$20,000			
APRIL	\$30,000			
MAY	\$70,000			
JUNE	\$300,000			
JULY	\$300,000			
AUGUST	\$300,000			
SEPTEMBER	\$100,000			
OCTOBER	\$100,000			
NOVEMBER	\$100,000			
DECEMBER	\$100,000			

# SMART Goals...the good stuff - examples!

## Catering by Michaels 2022 SMART Goal 1: Annual Sales Goal

In 2022, annual sales goal of \$1,500,000.00

1a: In 2022, book 4 events at Morgan Manufacturing

1b: In 2022, increase total corporate picnic sales by 10% over 2019 sales numbers.

### Action Plan 1a:

Bring 1 client to tour MM per quarter.

1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_ 4 \_\_\_\_\_

By end of Q1, create custom marketing 1 sheet for MM

Once per month, fun gift, card, coffee date, lunch, just because email with MM

Once per month, beginning in April, send 1 sheet to a client promoting MM

### Action Plan 1b:

By end of Q1, create 1 sheet with all upsell opportunities

Offer Q1 incentive for a free popcorn cart if booked & deposited by 3.31

Bring 4 clients for a tour by end of May

2019 Total Picnic Sales: \$627,916.00      2022 Target: \$690,707.60

As of 2/1/2022:

Definite: \$365,726.00      Tentative: \$193,526.00      To Goal: \$131,455.60

WHAT ARE SMART GOALS AND ARE  
YOUR GOALS SMART ?



# SMART Goals...the good stuff - examples!

## Catering by Michaels 2022 SMART Goal 2: Relationship Development

In 2022, book two events with two new to me planning companies.

### Action Plan:

Company 1: 1 \_\_\_\_\_ 2 \_\_\_\_\_

Company 2: 1 \_\_\_\_\_ 2 \_\_\_\_\_

In Q1, schedule and plan a CBM Experience for each company.

CBM Experience 1: \_\_\_\_\_ CBM Experience 2: \_\_\_\_\_

See Relationship Tracker - Quarterly gifts, coffee dates, invites to events, etc.

Once per quarter, refer & recommend services with current wedding clients

Company 1:

1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_ 4 \_\_\_\_\_

Company 2:

1 \_\_\_\_\_ 2 \_\_\_\_\_ 3 \_\_\_\_\_ 4 \_\_\_\_\_

Once per year, invite each company to attend a networking event

Share my SMART goal with each chosen company over lunch in Q1

Lunch 1: \_\_\_\_\_ Lunch 2: \_\_\_\_\_

WHAT ARE SMART GOALS AND ARE YOUR GOALS SMART ?



## SMART Goals...the good stuff - examples!

### Catering by Michaels 2022 SMART Goal 3: Dealer's Choice

By the end of Q2 (June 2022), become proficient in making 4 commonly used custom items independently - thank you cards, flyers, gift tags, menu signage using the Canva software.

#### Action Plan:

- In January, schedule a one-hour tutorial with Lisa Ware  
Scheduled: \_\_\_\_\_
- In February, schedule a one-hour tutorial with Karli Topping  
Scheduled: \_\_\_\_\_
- In March & April, finish assigned work to practice making gift tags, thank you cards, flyers, custom menu signage.  
Gift Tags Completed: \_\_\_\_\_  
Thank You Cards Completed: \_\_\_\_\_  
Flyers Completed: \_\_\_\_\_  
Menu Signage Completed: \_\_\_\_\_
- By end of May, create 4 templates for each of the above  
Template 1: \_\_\_\_\_ Template 2: \_\_\_\_\_ Template 3: \_\_\_\_\_ Template 4: \_\_\_\_\_
- By June, proficient and flying solo with the Canva software

WHAT ARE SMART GOALS AND ARE  
YOUR GOALS SMART ?



## SMART Goals...the good stuff - examples!

### Catering by Michaels 2022 SMART Goal 4: Culture

In 2022, establish a Catering by Michael's Fantasy Football League to increase camaraderie between all employees and departments - and to have fun together!

#### Action Plan:

- In June, send out a preliminary poll to see who is interested  
Sent: \_\_\_\_\_
- In July, set up participation deadline, create an email thread between those who are participating & sign up within the app. Send instructions in English & Spanish. Ask participants their experience level.  
Deadline Scheduled: \_\_\_\_\_ Email Thread: \_\_\_\_\_
- In the beginning of August, ensure everyone is enrolled and ready for draft day. Host open office hours to teach people how to use the app if they have questions.  
Draft Day Scheduled: \_\_\_\_\_  
App Instructions Sent: \_\_\_\_\_  
Finalize Rules: \_\_\_\_\_  
Send Draft Day invitations: \_\_\_\_\_
- By end of August, host a "draft day" party at CBM  
Draft Day: \_\_\_\_\_
- Ongoing - weekly updates to all participants
- January - Post Season Party - prizes given to Winner & Runner-Up

WHAT ARE SMART GOALS AND ARE  
YOUR GOALS SMART ?



## SMART Goals...the good stuff - examples!

### Catering by Michaels 2022 SMART Goal 5: Personal

In 2022, run a marathon in the Fall of 2022 in a time that qualifies for the Boston Marathon in 2023.

#### Action Plan:

- Sub Goal: ENJOY WINTER RUNNING & not burn myself out so I can have a strong summer/fall training program. In June, send out a preliminary poll to see who is interested
- Beginning in June 2022, run all long training runs with the purple pace group to run a marathon time of sub 3:27.
- Weekly in Summer/Fall of 2022: journal after tempo & long runs:  
Nutrition: \_\_\_\_\_  
Moments of Joy: \_\_\_\_\_  
Challenges: \_\_\_\_\_  
Weekly Times: \_\_\_\_\_
- Peak Season (September 2022): Incorporate 2 peak runs verses one (20 miles & 22 miles)
- Share with Lisa training schedule when finalized to see if any days need adjusted timing to incorporate long runs during optimal hours!  
Share at the top of each month: \_\_\_\_\_

WHAT ARE SMART GOALS AND ARE YOUR GOALS SMART ?



## SMART Goals...a debunk of your fears!

**Lisa – this seems so overwhelming and so much work?**

A: Overwhelming. No. Well maybe. Keep in mind this is 8.5 years of doing SMART goals in a very short presentation. Start small and phase up from there. The most important thing is to start.

Work – yes. But it is smart work, intentional work, purposeful work that keeps you and your team accountable to their goals! This is work you would and should be doing anyways – but simplified and way more intentional.

**Lisa – how will I ever have time for this?**

A: You make time for what is important. Ultimately, these SMART goals are your team’s business plan. I spend 1 day per month on SMART goals. Easy!

**Lisa – my team will never do this?**

A: False. I had the hardest team ever to get on board. Promise. They were challenging. Start small. Create the path forward and show the value. My team is thriving with SMART goals, and it has eliminated the need for other meetings and so many other tracking forms. Their entire business plan lives within their SMART goals!

**Lisa – I hit my sales goal every year, why do I need SMART goals?**

A: Even the best salesperson needs an intentional path forward and a sense of direction. SMART goals provide clarity, focus and the motivation every team member needs to keep achieving goals. After all, a goal without a plan is just a wish!



QUESTIONS?

**Lisa Ware**

Director of Sales & Business Development

Catering by Michaels

[lware@cateringbymichaels.com](mailto:lware@cateringbymichaels.com)

847-966-6555

