Accelerate Performance

Cloud Effective's Productivity Pro facilitates management by objectives via SMART Goals
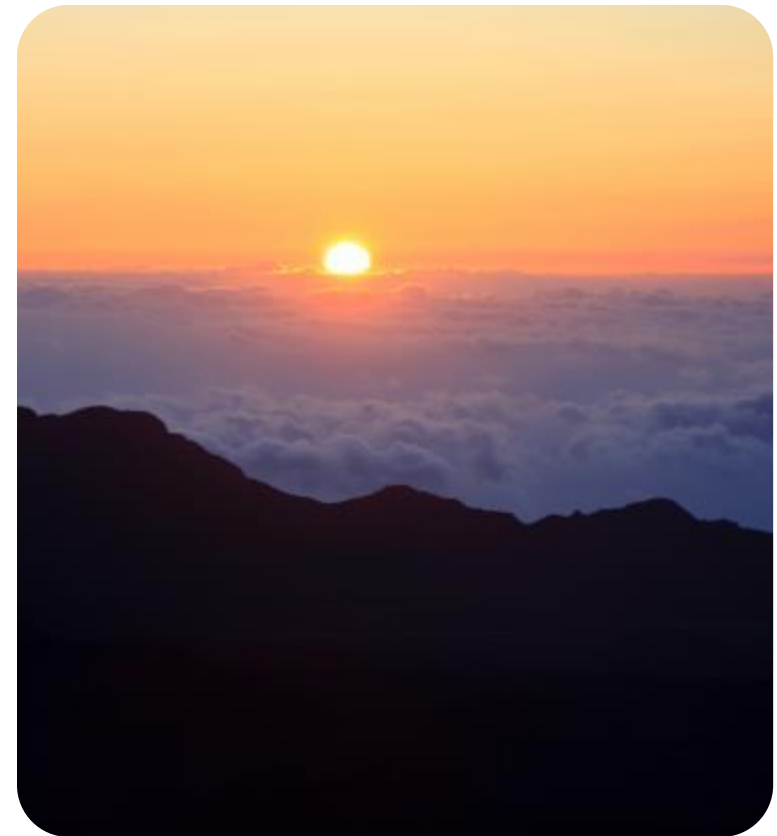
Cloud Effective

enabling teams to focus on

top priorities via cloud based social productivity

management applications

...turning ideas into results!

Cloud Effective

- Cloud-based business-social network

- Cost effective productivity solutions delivering outstanding performance now and in the future.

- Empowers finely honed executives, highly skilled professionals, self-employed entrepreneurs, small business owners, educational and public sector administrators

- Provides access to functionality _beyond that_ enjoyed by medium to large sized businesses with deep pockets!

- Flag ship productivity suite

   o Simplifies alignment and management of strategic missions, goals, projects and tasks

   o Replaces multiple systems with one

   o Facilitates collaboration among friends and colleagues

   o Our free product is sure to please and our more powerful premium product delivers amazing performance with break through affordability

A new horizon
   …turning ideas into results

.

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Cloud Effective: Manage all levels of activity

50,000 foot view:
　Company Vision
　(Now & over life of company)

ABC Company

Our Vision: Enhance the lives of our customers, shareholders and community through a continuous supply of innovative and cost effective widgets...making life more enjoyable one day at a time.

30- 40,000 foot view:
　Company (Team) mission
　(Now & over life of company/team)

ABC Corporate Team

Our mission is to create value for our shareholders, provide a great working atmosphere for our employees and provide value to the community

20-30,000 foot view:
　Goals & Projects
　(1 to 5 years)

Increase Revenue: New Product Sales (+$1M) - `On Target`

Achieve $1,0M sales from products introduced < 18 months prior: $100k from Surefire, $500K from SpitFire, $400k from CoolFire

5-10,000 foot view:
　Deliverables & projects
　(1 to 12 months)

Deliverables　　　　　　　　　　+ Create Deliverable

Title	Status	Start	Due ▲	%	$
Q1 Revenue $280k	On Target	12/31/2014	3/31/2015	25	$1,000.00

On the ground: Where the rubber
　meets the road
　Tasks: (1 to 90 days)

Tasks　　　　　　　　　　+ Create Task

Title	Status	Start	Due ▲	%	$	
Close XYZ Q4 contract ($180k)	✔ Complete	12/31/2014	1/11/2015	10	$600.00	Options ▾

Management By Objectives

Management

by:

Management by Objectives Continuous Cycle

Proprietary and Confidential Information

MBO Benefits and Potential Problems

MBO Benefits

1. Department and individual goals are aligned to corporate objectives

2. Resources are aligned to deliver against goals which are agreed upon to be important

3. Focus & thus performance improvement at all levels

4. Employee motivation & team work
   - Changes the way you manage your time
   - Compass over clock (Franklin-Covey)
   - Contributes to relationship building.
   - Provides structured opportunity to participate in decision making

Potential Stumbling Blocks

1. Constant change prevents MBO from taking hold

2. Trying to track too much with insufficient business systems
   - Tactical minutia driving out important goals
   - Tracking actions as MBOs

3. Lack of self-discipline

4. Too much 'paperwork' required for performance & resource management

5. Performance and rewards are disconnected

6. "Just another initiative…yadda yadda yadda…"

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SMART Goals

Specific

Measurable

Achievable & **A**greed Upon

Relevant

Time-Based

Goals: Results-driven planning statements that describe and quantify desired outcomes which individuals or teams are responsible to deliver

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Creating S.M.A.R.T. Goals

- **S**pecific

- **M**easurable

- **A**chievable & **A**greed Upon

- **R**elevant

- **T**ime-Based

- What results will be delivered?

- How will success be measured?

- Is this aligned to strategic goals? Should we do this? Is it reasonable? What areas will we stretch? Who owns it?

- Is this a high, medium, or low priority goal? How much of your time will you spend on this?

- By when?

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A Smart Goal:

- Is a performance planning statement that <u>describes</u> and <u>quantifies</u> an outcome (result) for which an individual or group is responsible to deliver

- Is a statement of an important and measurable outcome that when accomplished will help ensure the success of the company's most important goals: WIGs (wildly important goals); BHAGs (Big Hairy Audacious Goals), Commit, Plan, Stretch goals, etc.

- Answers what the key objective is and when it will be accomplished

  o Launch 3 products in growth markets with >30% annual growth by Q1 201x

  o Achieve >40% market share by Q4 201x

- Is not a wish

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Elements of an Effective Goal or Objective

- States desired results
- Aligned to higher level goals (corporate, department, team) or vision
- Identifies who is accountable
- Establishes criteria to measure success
- Establishes a timeframe
- Written in concise and easy to understand language
- Is validated
  - Cost of implementation and return on investment are understood
  - Prioritized and assigned importance
  - Fully communicated across necessary functions
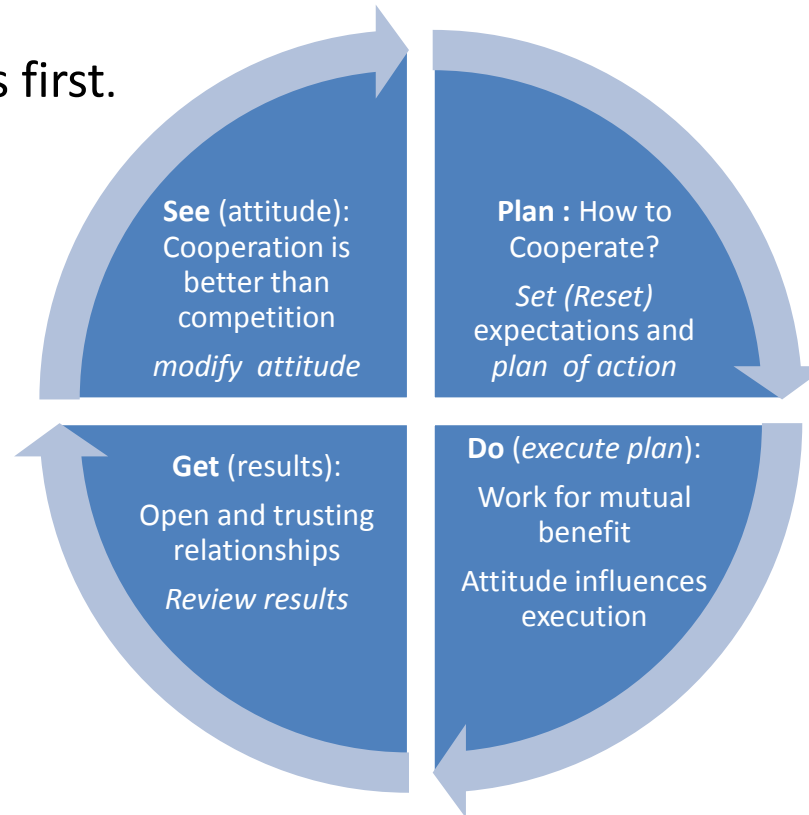- Not a description of routine activities

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Time Management Process

Ineffective:

I put urgent things first.

Effective:

I put important things first.

See (attitude): Cooperation is better than competition
modify attitude

Plan : How to Cooperate?
Set (Reset) expectations and *plan of action*

Get (results): Open and trusting relationships
Review results

Do (*execute plan*): Work for mutual benefit
Attitude influences execution

Cooperate & execute:
Effectiveness requires the integrity to act on your priorities in such a way that you obtain your desired results…repeatedly.

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Specific

- A specific goal has a much greater chance of being accomplished than a general goal. To set a specific goal you must answer the five "W" questions:
    - Who: Who is the owner & who is a key contributor?
    - What: What do I want to accomplish?
    - When: Establish a time frame.
    - Which: Identify requirements and constraints.
    - Why: Specific reasons, purpose or benefits of accomplishing the goal.

- By reviewing these questions we answer the question: "What am I specifically responsible for?"

- EXAMPLE:

    o A general goal would be, "Get in shape."

    o But a more specific goal would say, "Join a health club and workout 3 days a week on Monday, Weds and Friday."

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Measurable

- Establish concrete criteria for measuring progress toward the attainment of each goal you set.

    - When you measure your progress, you stay on track,

    - Reach your target dates, and

    - Experience the exhilaration of achievement that spurs you on to continued effort required to reach your goal.

    - Criteria should be stated in terms of quantity, quality or timeliness.

- To determine if your goal is measurable, ask questions such as

    - How much?

    - How many?

    - How will I know when it is accomplished?

- Through this process you will answer the question: "What standard will be used to measure my success?"

Proprietary and Confidential Information

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Agreed Upon + Achievable

- When you have goals with interdependencies you must:
  - Ensure that they are agreed upon by all necessary parties
  - Ensure team members have a chance to "buy-into" the goal
    - The "buy-in" phase is essential to synergistically define the goal
    - Agreement inspires commitment toward achieving the mutual goal
- The organization's leadership and, where appropriate, its stakeholders should agree that the goal is important and that appropriate time and resources will be focused on its successful completion.

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Agreed Upon + Achievable

- To be achievable , a goal must:
  - Represent an objective toward which you are both willing and able to work
  - Be achievable within the current organizational constraints (There must be a chance that a goal can be accomplished)
    - This does not mean or imply that goals should be easy.
    - On the contrary, a goal should be challenging, perhaps even a stretch to ones capabilities
  - A goal can be both a stretch and realistic
    - Be sure that every goal represents substantial progress
    - A difficult goal is frequently easier to reach than a easy goal because an easy goal exerts low motivational force.
    - Some of the hardest jobs you ever accomplished actually seem easy simply because they were a labor of love.

- One should honestly ask:
  - "Is it possible to accomplish the goal in the established timeframe, given the available resources?" and
  - "Do I have the necessary resources and skills?"

- An attainable goal should allow for flexibility in how it is achieved within the confines of law, company & personal values.

- A goal that can no longer be achieved should be altered or abandoned.

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Relevant

- Goals should be appropriate and consistent with the mission, vision and values of the organization.

- Each goal adopted by the organization should be one that moves the organization toward the achievement of its vision.

- Relevant goals will not conflict with other organizational goals.
  - *As noted earlier, goals are set by or in concert with the person responsible for achievement*
  - *It is important that all short-term goals be relevant (e.g., consistent) with the longer-term and broader goals of the organization.*

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Relevant
Prioritization of Goals (Possible score (weight) is higher for higher priority goals):

- Identifies where the greatest amount of effort should be expended

- Facilitates everyday decisions

- Your schedule/calendar is driven by priorities not urgency (Covey's concept of compass over calendar)

- Establishes that not all goals are of equal importance and establishes order of importance

- Knowing the priority and importance of each goal enables appropriate planning of time and resources

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Relevant: Prioritization of Goals

- As you assign value to the level of importance you should consider what is:

    - Critical (high weight)
    - Very Important (medium weight)
    - Important (Low weight)

- Taking into consideration the level of:

    - Difficulty
    - Strategic importance
    - Value in relation to other objectives

ABOVE THE WATERLINE:
CRITICAL OBJECTIVES
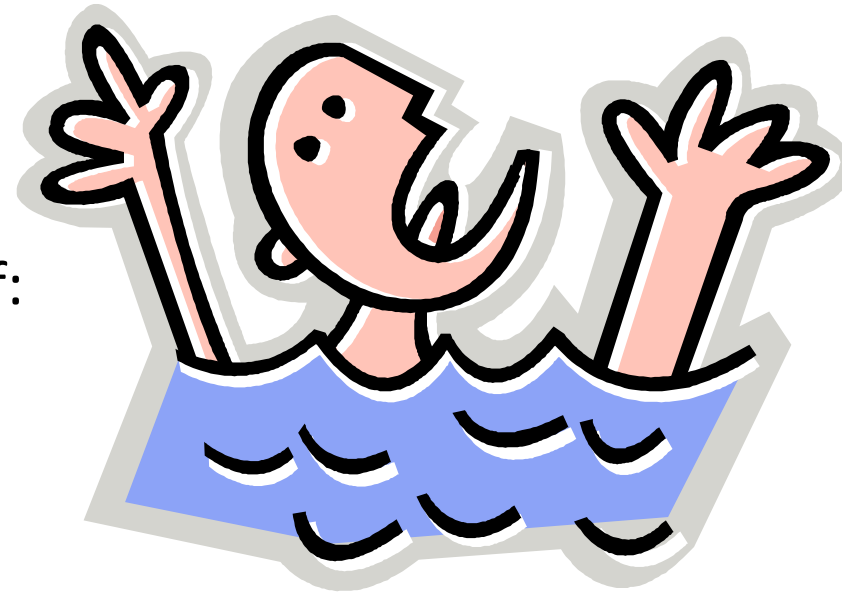
BELOW THE WATERLINE:
ROUTINE ACTIVITIES
DON'T DROWN IN MINUTIA

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Time-based

- Goals must exist within the context of a schedule
- This schedule must contain more than just a simple start date and completion date.
- For a goal to be truly SMART, there must be an agreed upon timetable that incorporates regular, structured review and assessment of progress toward the goal
- By having a timeline you will ensure momentum and focus, with benchmarks along the way to the completion of the goal.
- Ask: "What is the timeline for the goal?" Add incremental milestones in each quarter throughout the year so that you achieve your yearly deliverable
  - Use Gantts and program management for linking goals to key milestones in your projects
  - Use action boards (tasks with desired results) to deliver milestones for each of your goals and related projects
  - Don't let minutia and 'urgent' actions become your 'wildly important goals'

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SMART Goals Have Never Been Easier

- Step by step worksheet facilitates "SMART"

- Cascading goals facilitates alignment to organizational objectives.

Goals

- Create SMART goals
  - Personal goals from your 'My goals' page
  - Team goals from team pages if the goal is specific to a department, committee or group (project team)

- The My Goals page displays:
  - Personal and team goals with status and due date
  - The next action for each goal with status and due date

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6 ✉ Getter Dunn ▼

Dashboard

Teams

Goals

Projects

Tasks

My Goals

Create a new goal   **+ New Goal**

Apply a fliter to display only the rows you desire

Drag a column header and drop it here to group by that column

Title	Status	Due	Weight ▼	Next Action	Action Status	Action Due	
Develop Product SureFire	On Target	9/28/2015	30	BOM	On Target	4/23/2015	☰
Develop Product SpitFire (Enter Pilot)	On Target	7/28/2015	20		Not Started		☰
Revenue	On Target	12/30/2015	15	Q1 2015 Revenue	On Target		
2015 Bookings Targets	On Target	12/30/2015	15		Not Started		
Product Mix (Margin Targets)	At Risk	12/30/2015	10		Not Started		
Product HipFire	On Target	6/29/2016	10		Not Started		☰

Click next to the title to edit text.

Enter next Action

Details

Create Deliverable
Create Task

Edit
Change Owner

|◀ ◀ **1** ▶ ▶|

Hover over the title to view details and results
Click on the title to access details and results

1 - 6 of 6 items

Edit directly in our SmartGrid
Review the next action associated with your top goals
If there is no next action, enter one directly in the SmartGrid

Use the drop down menu to veiw or edit the goal details or to add a deliverable or task...even assign the goal to a colleague by changing owner.
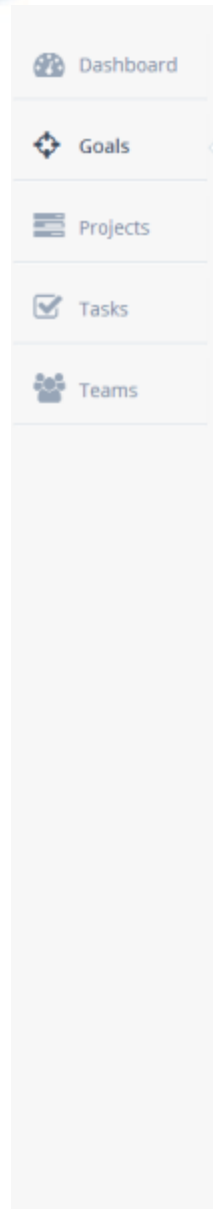
? **Help is always only a clck away:**   Need Help? Click Here | Privacy Policy | Terms of Use

Goals

- Prompt based Goal entry/edit form facilitates:
  - User documentation of goals
  - Consistent and sortable data fields
- Goal level: Is this an individual goal or 'team goal'? Group level allows you to manage ('own') a goal at a team level (all team members will be able to view the goal) or privately as an individual
- Ability to add 'parent' goals allows teams to cascade high level objectives to departments, cross functional teams (groups) and to individuals
- Weight allows user to designate importance (relevancy) level on a scale of 1 to 100 (Example: Top goal @ 50, next @ 20 and 3 @ 10 each)

Dashboard

Goals

Projects

Tasks

Teams

Create a Goal

💡 Goals should be specific, measurable, attainable, realistic and timely.

Goal Level:

Individual

Parent Goal:

None

Title

Goal Details

Metrics:

+

Due Date

Weight (Importance)

0

Status

Not Started

Save

Does your goal support a higher level objective?

Brief description or project name

Specific, attainable, measureable (schedule, cost, performance) results

How will you know you are successful? (Ex: Revenue, Margin, Key performance indicators or product features, customer satisfaction measures, defect rates, et cetera)

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Goal Example

- Prompt based Goal entry/edit form facilitates:
  - User documentation of goals
  - Consistent and sortable data fields
- Goal level: Is this an individual goal or 'team goal'? Group level allows you to manage ('own') a goal at a team level (all team members will be able to view the goal) or privately as an individual
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- Weight allows user to designate importance (relevancy) level on a scale of 1 to 100 (Example: Top goal @ 50, next @ 20 and 3 @ 10 each)

💡 Goals should be SMART: **S**pecific, **M**easurable, **A**chievable, **A**greed Upon, **R**elevant and **T**ime based.

Parent Goal:
ABC Corporate Team: Revenue ▾

Team:
ABC Corporate Team ▾

Title
2015 Bookings

Goal Details
Increase bookings 25% for each quarter year to year to support quarterly and yearly revenue, gross and profit

Metrics:
Bookings 🗑
Mix 🗑
GM 🗑
GP ➕

Due Date
📅 12/31/2015

Weight (Importance)
60

Goal Results

Status
On Target ▾

Save

Select Parent Goal (higher level objective) if applicable

Brief description or project name

Specific, attainable, measureable (schedule, cost, performance) results

How will you know you are successful?

Simply click on 'plus sign' to add another metric

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Choose appropriate status

Active

- Not started
- On target
- Requires input/help
- At risk (…of missing schedule, missing cost or performance)
- Will miss (…will miss schedule, miss cost or performance…unless…)
- Missed (open) (missed schedule, cost and/or performance, but still working)

Inactive

- Complete
- Partial (missed on some metrics, but completed others…)
- Missed (closed) (missed too many key performance metrics)
- On hold
- Cancelled

Parent Goal:

ABC Corporate Team: Revenue ▼

Team:

ABC Corporate Team ▼

Title

2015 Bookings

Goal Details

Increase bookings 25% for each quarter year to year to support quarterly and yearly revenue, gross and profit

Metrics:

Bookings 🗑

Mix 🗑

GM 🗑

GP ✚

Due Date

📅 12/31/2015

Weight (Importance)

60

Goal Results

Status

On Target ▼

Save

Click on the plus sign to add another metric, the trash can to delete a metric

Highlight the appropriate status

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Goal Execution Page

- Click on goal from My Goals or Team Page to open the goal execution page

- Add Quarterly or monthly deliverables to your high level goals

- Visual color-coded representation of status

- Add specific tasks (action board) to support goals

- Use comments to communicate to goal owner (@username feature coming early 2015)

- Use links to keep pertinent information 'at your fingertips'

- Link to OneDrive, GoogleDrive, DropBox for document management and versioning

Top Level Corporate Earnings - At Risk

Increase companies earnings from X to Y by end of calendar year.

Deliverables + Create Deliverable

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Q1 Corporate KPIs	✔ Complete	12/29/2013	3/29/2014	25	$0.00	Options ▾
Q2 Corporate KPIs	Missed-closed	3/30/2014	6/29/2014	25		Options ▾
Q3 Corporate KPIs	At Risk	6/27/2014	9/27/2014	25	$0.00	Options ▾
Q4 Corporate KPIs	On Target	9/27/2014	12/28/2014	25		Options ▾

1 - 4 of 4 items

Tasks + Create Task

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Bookings and Backlog mitigation	✔ Complete	6/17/2014	6/28/2014	30	$0.00	Options ▾
Q4 Product mix: Target Surefire	On Target	10/11/2014	11/28/2014			Options ▾

1 - 2 of 2 items

Comments | Links

We are on target to have an executable plan in place and rolling to mitigate risk to corporate earnings and key KPI targets no later than 7/7/14

- John Effective - 6/28/2014

Jane Effective has identified two new customers who have committed to book orders by 7/15 & 7/22. Expected yearly booking with monthly call-offs which will eliminate gap. Still need to identify upside opportunities to mitigate identified risks.

- John Effective - 6/28/2014

Cloud Effective

Goal Execution Page Layout

Top Level Corporate Earnings - At Risk
Increase companies earnings from X to Y by end of calendar year.

Goal title, details, and status

Options ▾

Deliverables
+ Create Deliverable

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Q1 Corporate KPIs	✔ Complete	12/31/2014	3/31/2015	25	$0.00	≡
Q2 Corporate KPIs	At Risk	3/31/2015	6/27/2015	25		≡
Q3 Corporate KPIs	On Target	6/30/2015	9/30/2015	25	$0.00	≡
Q4 Corporate KPIs	On Target	9/30/2015	12/31/2015	25		≡

|◄ ◄ **1** ► ►| 1 - 4 of 4 items

Interim deliverables associated with your goal

Tasks
+ Create Task

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Q2 Bookings and Backlog mitigation	At Risk	2/27/2015	6/26/2015	30	$0.00	≡
Q4 Product mix: Target Surefire	On Target	8/8/2015	11/30/2015	15	$2,500.00	≡

|◄ ◄ **1** ► ►| 1 - 2 of 2 items

Tasks associated with deliveralbles or directly to your goal

Due Date
12/30/2015
Weight
40
Metrics
Gross Profit
Net Profit
Profit Margin
Revenue
Owner
👤 John Effective
Team
ABC Corporate Team
Child Goals
  Bookings and Backlog
◢ Revenue
    Increase Sales of Existing Products (+$
  ▸ Increase Revenue: New Product Sales
    Create ProjectiFly Marketing and Sales
  ▸ 2015 Bookings
  Next Big Thing #1

Additional Goal details:
Due date
Relevance
Metrics
Owner
Team
Child Goals

Comments   Links

We are on target to have an executable plan in place and rolling to mitigate risk to corporate earnings and key KPI targets no later than 7/7/14

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Jane Effective has identified two new customers who have committed to book orders by 7/15 & 7/22. Expected yearly booking with monthly call-offs which will eliminate gap. Still need to identify upside opportunities to mitigate identified risks.

- 👤 John Effective - 6/28/2014

Add Your Comments

Goal execution communication board and links

Proprietary and Confidential Information

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View a goal & its deliverables:

- Scroll through deliverables for a quick overview

- Hover overs facilitate quick review of details and results

- In the example below the cursor is 'hovering' over the Q2 Corporate KPIs displaying desired and actual results

2015 Bookings - On Target   Review the goal and all associated deliverables.

Increase bookings 25% for each quarter year to year to support quarterly and yearly revenue, gross and profit margin targets

Hover over the title to quickly view details and results

Deliverables

Drag a column header and drop it here to gro...

Details:

Increase bookings from $1M in Q1 2014 to $1.25M or greater in Q1 2015. Ensure mix enables GM of >60%.

Results:

Booked $1.3M. Mix will hit GM > 60% if Ops hits cost targets

Title	Start	Due ▲	%	$	
Q1 Bookings, Convertible & Mix >1.25M	12/29/2014	3/29/2015	60	$10,000.00	☰
Q2 Bookings, Convertible & Mix >$1.875N	3/28/2015	6/27/2015	60	$10,000.00	☰
Q3 Bookings, Convertible & Mix >$1.563N	6/28/2015	9/28/2015	60	$10,000.00	☰
Q4 Bookings, Convertible & Mix >$2.188M	Not Started 9/28/2015	12/29/2015	60	$10,000.00	☰

+ Create Deliverable

1 - 4 of 4 items

Parent-Child Goals Easily Navigated

Top Level Corporate Earnings - `At Risk`

Increase companies earnings from X to Y by end of calendar year.

Options ▾

Deliverables

+ Create Deliverable

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Q1 Corporate KPIs	✔ Complete	12/29/2013	3/29/2014	25	$0.00	Options ▾
Q2 Corporate KPIs	Missed-closed	3/30/2014	6/29/2014	25		Options ▾
Q3 Corporate KPIs	At Risk	6/27/2014	9/27/2014	25	$0.00	Options ▾
Q4 Corporate KPIs	On Target	9/27/2014	12/28/2014	25		Options ▾

◄ ◄ 1 ► ► 1 - 4 of 4 items

Tasks

+ Create Task

Drag a column header and drop it here to group by that column

Title	Status	Start	Due ▲	%	$	
Bookings and Backlog mitigation	✔ Complete	6/17/2014	6/28/2014	30	$0.00	Options ▾
Q4 Product mix: Target Surefire	On Target	10/11/2014	11/28/2014			Options ▾

◄ ◄ 1 ► ► 1 - 2 of 2 items

Comments | Links

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- 👤 John Effective - 6/28/2014

Due Date
12/31/2014

Weight
50

Metrics

Gross Profit

Net Profit

Profit Margin

Revenue

Owner
👤 John Effective

Team
ABC Corporate Team

Child Goals

  Bookings and Backlog
  ▲ Revenue
    Increase Sales of Existing Products (+$2I
    ▲ Increase Revenue: New Product Sales (+
      ▲ NPI: Create Value Via SureFire Introdu
        ▲ Product SureFire
          Test Goal PLM
        ▲ Develop Product SureFire
          ▶ Product CoolFire Alpha Phase
          Product SureFire Web App
          Product SureFire Mobile App
          Next Big Thing #1
      Develop Product SpitFire (Enter Pilot)
      Product CoolFire
  Next Big Thing #1

- Parent Child Goal Family tree
- Expand or contract
- 'Click-on' navigation

Get Started Now!

Launch the process to create your free account accelerate your results!

Copy this link into any browser (Chrome is preferred whether mobile or computer) to get started: https://app.cloudeffective.com

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