INITIATIVE BRAINSTORM

What is the specific area of the business or the result this session will address?

Initiative: _____

What are the ideas or initiatives that will drive desired results? Be as broad reaching as needed and no idea is a bad idea. Please avoid getting into nuanced specifics on any specific idea. Instead, focus on the overall picture and move on to the next idea. *Example Initiative: Expand Profit Margin. Idea: Cut costs in supplies*

Idea List	Ease	Impact	Order

SMART GOALS FOR INDIVIDUAL TEAM MEMBERS

What are the key outcomes desired for the Team:

1 –

2 –

3 –

4 –

What are the ways that you, in your role, can contribute to the key outcomes that the team desires?

Personal Goals

S Specific What do you want to accomplish?		
M Measurable How do you plan to track your progress?		
A Achievable Is this goal realistic? If so, how?		
R Relevant How is this goal relevant to the team goal?		
T Timebound How long will it take to achieve the goal?		

TRAJECTORY ASSESSMENT

This worksheet is to help a company identify the operational metrics needed to achieve a stated goal while comparing those metrics to current operational metrics. This will help a leadership team clearly identify the areas of the business operations that most need to improve to ensure that the company achieves their desired outcomes.

1. $_____ = Desired Revenue Run Rate Annualized

2. $_____ = Desired Weekly Run Rate (#1 / 52)

3. $_____ = Current or planned Hourly Rate

4. _____ = Weekly Hours. (#2 / #3)

5. _____ = Current or desired average weekly hours per client

6. _____ = Implied Census (#4 / #5)

7. _____ = Current Churn Rate or desired churn rate

8. _____ = Implied Weekly Discharges (#6 * #7 / 52)

9. _____ = Current or desired lead conversion rate

10. _____ = Implied weekly leads required to maintain desired census (#8 / #9)

11. _____ = Current or desired weekly hours worked by caregivers

12. _____ = Implied CG Pool. (#4 / #11)

13. _____ = Current Turnover Rate or desired turnover rate

14. _____ = Implied weekly terminations (#12 * #13 /52)

15. _____ = Current applicant conversion rate

16. _____ = Implied weekly apps required to maintain desired pool (#14 / #15)

17. _____ = Current weekly hours

18. _____ = Difference of current hours and desired weekly hours (#4-#18)

19. _____ = Hours growth rate per week (#18/ timeline in weeks)

20. _____ = Net Clients needed weekly to attain goal (#19/#5)

21. _____ = Net Leads needed weekly to attain goal (#20/#9 + #10)

22. _____ = Net Caregivers needed weekly to attain goal (#19/#11)

23. _____ = Net Applications needed to attain goal (#22/#15 + #16)