THE CORE ELEMENTS

INTENTION
Be thoughtful with your time.

FOCUS
Do not let yourself be distracted.

ACTION
To have success, you must do.

"There is no dress rehearsal in life. You get one shot. Make it count."

THE TOOLKIT · A LEADER'S GUIDE

Goals That Compound

Chart your path. Become your best self. Move the organization.

Most goal-setting stops at the individual. That is only half the job. This model connects your personal growth to the priorities of the organization you serve, so your goals move you and the company at the same time.

Personal goals make you better. Nested goals make the whole organization better.

INSIDE THIS GUIDE

1. Why goals matter when the organization is moving fast
2. The model at a glance
3. The core: intention, focus, action
4. Nested goals: the cascade, the rules, and the catchball conversation
5. Your foundation: mission, vision, and values
6. Growth areas and your one-page roadmap
7. The Action Rule of 5 and the 5 | 50 | 500 network
8. Making it a rhythm, plus two worksheets

Dr. Michael Burcham
theburchamgroup.com

WHY GOALS

The Organization Is Moving. Are You?

A growing organization moves fast. That pace is the point. It is also the risk.

BUILT TO GROW

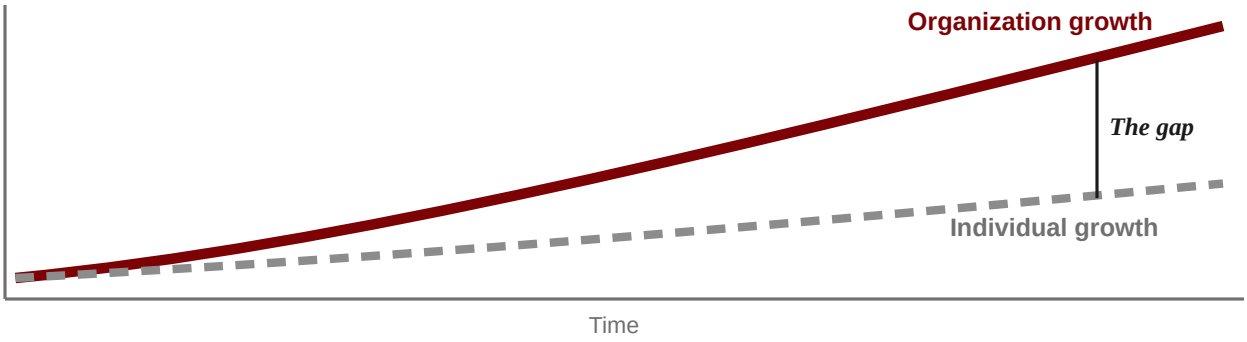
Growing organizations change shape quickly. The company you joined will not be the company you work for two years from now.

THE QUIET RISK

If we are not intentional, the organization grows faster than we do. When that happens, our value to it declines, quietly, month by month.

THE GOOD NEWS

Growth in your role is not a lottery. It is designed. The people who rise are the ones with written goals and a plan to hit them.



When people stop growing, the business feels it first

Even with smart, committed people, a team that is not developing becomes the constraint. It shows up in four ways:

1. **Operational bottlenecks.** Work queues behind the few people who can do it. Speed dies in the line outside their door.
2. **Cross-functional conflict.** Teams that stop learning start defending. Turf replaces curiosity.
3. **Slower, worse decisions.** Yesterday's knowledge applied to today's problems. The market moved; the mental model did not.
4. **Key-person dependence.** The business leans on heroes instead of systems, and every hero eventually needs a vacation.

> ***An organization can only grow as fast as the people inside it are growing.***

THE MODEL AT A GLANCE

Write Them Down. Nest Them Up. Review Them Out Loud.

Four parts. The core is how you show up. The nest connects you to the organization. The roadmap grows you. The rhythm keeps it alive.

1 · The Core

Intention, focus, and action. Three disciplines, in order. Each one earns the next.

2 · The Nest

Three to five goals that cascade from the organization's priorities, to your leader, to you, to your team.

3 · The Roadmap

Your foundation, three to five growth areas, a one-page plan, and the network to support it.

4 · The Rhythm

Daily and weekly action, quarterly reviews, and an annual rewrite.

The seventy-thirty split

About 70%: nested goals that move the organization

About 30%: goals that grow you

Roughly 70% of your goals nest up to the organization's plan. The other 30% grow you: skills, network, craft. The organization gets most of the nest, but never all of it.

What you will produce

OUTPUT	WHAT IT IS	WHERE IN THIS GUIDE
My nested goal map	Four lines: the priority I serve, my leader's goal, my three to five goals, what cascades to my team	Pages 5 to 7
Mission, vision, and values	Your foundation, in your own words	Page 8
My roadmap	One page per year: growth areas, goals, quarterly steps, people, barriers	Page 9
This week's page	The Rule of 5 in action: big rocks, self-care, outreach, progress	Page 10
My 5 | 50 | 500 map	Mentors, experts, and connectors, built on purpose	Page 11

PART 1 · THE CORE

Intention. Focus. Action.

Three disciplines, in order. Each one builds on the one before it. Skip a step and the climb stalls.

BEING INTENTIONAL

Life is made of choices. Choose on purpose.

Every morning is a new opportunity. The past explains you; it does not have to define you.

Examine yourself honestly. Know your passions, talents, and abilities, and your weaknesses and blind spots, with equal clarity.

Choose your pattern. Intentional people decide who they are becoming. Everyone else finds out by accident.

"Knowing yourself is the beginning of all wisdom." ***Aristotle***

HAVING FOCUS

Decide what matters. Ignore what does not.

Stop comparing. You were not born to live someone else's life. Set your priorities and decide to be good at them.

Train the muscle. Focus is built through repetition. "I'm just not focused" is a self-fulfilling prophecy, not a diagnosis.

Evaluate your environment. Look at the stream you are in, where it is headed, and whether that is the direction you want.

"We become the average of the five people we spend the most time with." ***Jim Rohn***

TAKING ACTION

The universe rewards motion, not intention.

Act on your desires. Everyone wants; the achievers move.

Commit to learning. Successful people are curious, with the humility to learn from others. Find the people doing what you want to do, then study them.

Put goals in writing. Goals move us and goals shape us. Written goals introduce intentionality by their very nature.

Goals + Commitment = Realized Dreams.

> ***Desire separates you from no one. Success belongs to the ones who do.***

QUESTIONS TO ASK YOURSELF

- What do I want so much that I will invest my most precious asset, my time, and forgo other opportunities?
- What am I focusing on to become my best self, and how will I measure my progress?
- What will I stop doing? What will I start doing, and when?

PART 2 · THE NEST

Goals Are Not a List. They Are a Cascade.

Every goal in the organization should nest inside a bigger one, from the boardroom to the front line. Nothing floats.



THE TEST

Pick any goal in the organization. Can you trace it **up** to an organization priority in two moves or less, and **down** to the front line where it gets executed?

If not, why is anyone working on it?

Why nesting matters

1. **The plan is the top of the tree.** Every organization worth working for has a plan: grow revenue, improve margin, serve more people, build capability. That plan is not abstract. It is the root every goal should trace to.

2. **Speed requires alignment, not heroics.** A fast-growing organization cannot afford fifty people rowing in forty directions. Nested goals are how an organization moves fast without tearing itself apart.

3. **Visibility is opportunity.** When your goals visibly ladder to the organization's priorities, leadership can see your impact. The next big role goes to the people whose goals moved the plan.

> ***Organizations fund what they can trace. So does your career.***

PART 2 · THE NEST

One Goal, Four Levels

A services company, this year. Notice that every level has a number, a date, and one owner.

LEVEL	THE NUMBER	THE GOAL	ITS ROLE
Company	**$8M → $11M**	Grow EBITDA this fiscal year	The plan
CEO	**40% → 55%**	Move recurring contract revenue to 55% of total	The biggest lever
VP of Sales	**10 contracts**	Sign ten client contracts by Q3	The department's share
Account executive	**3 closes**	Close three contracts in my territory; renewals above 90%	One person's nest

Now walk it back up. If the account executive closes three, the region signs ten, recurring revenue reaches 55%, and EBITDA lands at $11M. One person's quarter connects to the value of the whole company.

The rules of the nest

Nesting fails from complexity more often than from laziness. Keep the rules few and hard.

1 **THREE TO FIVE GOALS PER PERSON**
Never more than five. A person with nine goals has none. Scarcity forces the ranking conversation.

2 **EVERY GOAL HAS A NUMBER AND A DATE**
"Improve communication" is a wish. "First-time-fix above 85% by Q3" is a goal.

3 **SEVENTY-THIRTY**
Roughly 70% of your goals nest up to the organization's plan. The other 30% grow you.

4 **NEGOTIATED, NOT ASSIGNED**
Leaders propose the what. You propose the how and the number. Both sign.

5 **REVIEWED QUARTERLY, OUT LOUD**
A goal reviewed in private quietly dies. The nest is a shared scoreboard, not a drawer.

If a goal cannot say its number and its date, it is not a goal yet.

PART 2 · THE NEST

Negotiate the Nest

Goals cascade down, but commitment only travels up. The handoff is a conversation, not a memo.

The catchball conversation

STEP 1 · LEADER THROWS
Your leader proposes the what: "My goal is X. I need your part of it to be roughly Y."

STEP 2 · YOU THROW BACK
You propose the how and the number: "I can commit to Y by this date if I have Z."

STEP 3 · AGREE THE TRADE
Resources, priorities, and what comes off your plate to make room. Scarcity is honest here.

STEP 4 · WRITE IT DOWN
Both of you sign the same sentence: the goal, the number, the date, the resources.

The step most teams skip is Step 3: deciding what comes off the plate. "Catchball" comes from hoshin planning: the goal goes back and forth until both hands have touched it. *A goal you helped set is a goal you will fight for.*

What nesting is, and what it is not

NESTING IS

- Line of sight from any desk to the organization's priorities
- A shared scoreboard the whole team can read
- Commitments you negotiated and signed
- A living document that re-nests when the plan shifts

NESTING IS NOT

- Your job description restated with numbers
- A task list of everything you do all day
- A form you fill in January and find in December
- A surveillance tool for catching people

> ***Your job description is what you maintain. Your goals are what you change.***

My nested goal map: four lines

LINE	WHAT TO WRITE
The priority I serve	Which of the organization's three to five priorities does my work ladder to?
My leader's goal	The goal my leader has signed up for, in their words, with their number.
My three to five goals	Each with a number and a date. Mark which nest up (70%) and which grow me (30%).
What cascades to my team	If I have direct reports: the piece of each goal they will own next.

Fill it in with your leader in the room if you can. Guessing the level above you is how nests break.

PART 3 · THE ROADMAP

Write Them Down. Start With Your Foundation.

Every two to three years should bring a period of introspection: what am I doing to become my best self?

Written goals introduce intentionality by their very nature. They move us and they shape us. **Unwritten goals stay negotiable with yourself. Written goals negotiate back.**

In Dr. Gail Matthews' goal-setting study at Dominican University, people who wrote their goals down, committed to specific actions, and sent weekly progress reports to a friend accomplished significantly more than those who only thought about their goals.

> ***"If you want to live a happy life, tie it to a goal, not to people or things."***
>
> Albert Einstein

Mission, vision, and values

Goals built on someone else's definition of success will exhaust you. Start with yours.

MY MISSION

Why do I exist?

A concise explanation of your reason for existence: your bigger purpose, your big WHY, in two sentences.

MY VISION

Where will I be in five years?

Inspirational and aspirational. If I achieve my goals, what does my life look like five years from now?

MY VALUES

What behaviors do I live by?

The five principles that govern your choices, and the conduct you will not tolerate in your professional or personal life.

AN EXAMPLE: MINE

My mission. To help inspire better leaders by sharing my own lessons learned through teaching, mentoring, and coaching.

My vision. To be a nationally recognized coach, investor, and advisor to the businesses of great entrepreneurs and CEOs.

My values.

- **Integrity.** I only get one reputation.
- **Excellence.** I work with those who are good and wish to become great.
- **Impact.** I look to make a difference in others' lives every day.
- **Kindness.** No one cares how much you know until they know how much you care.
- **Grit.** Nothing is impossible. One shot. Make it count.

Written. Shared. Reviewed every year.

PART 3 · THE ROADMAP

Choose Your Growth Areas. Build Your Roadmap.

Three to five growth areas, no more. Choose them like investments.

1 YOUR CRAFT
The skill your role is paid for. What would the next level of mastery look like this year?

2 YOUR INDUSTRY
Market knowledge, key players, business models, trends. Stay current or fade quietly.

3 YOUR NETWORK
The mentors, experts, and connectors around you. Built on purpose, not by accident.

4 YOUR LEADERSHIP
The human skills: coaching, deciding, communicating. The ceiling on every other skill.

The roadmap: one page per year

For each growth area: the goal with its number and date, action steps by quarter, the people and resources you need, and the barriers in the way. One goal per growth area.

AN EXAMPLE: A DIRECTOR OF OPERATIONS

GROWTH AREA	GOAL	ACTION STEPS BY QUARTER	TYPE
Operational excellence	Cut rework below 3% by Q4	Q1 map the top defect sources · Q2 pilot standard work in two regions · Q3 roll out · Q4 audit and hold	NESTED
Team bench	A ready successor for every supervisor seat by Q3	Q1 assess the team · Q2 development plans signed · Q3 stretch assignments live	NESTED
Industry knowledge	Lean certification; two best-in-class site visits	Q2 certification · Q3 site visits · Q4 teach one internal workshop	PERSONAL
Network	Five operators added to my expert list; a mentor cadence running	Q1 identify · Q2 outreach · monthly mentor check-ins from March	PERSONAL

Two goals nest into the company plan. Two grow her. By weight of effort, that is the seventy-thirty rule in practice.

If it is not on one page, it will not survive the year.

The Action Rule of 5

Goals die in the gap between the annual plan and this afternoon. The Rule of 5 closes it.

1

EVERY DAY

Do one thing that moves you measurably closer to a goal. One. Before the day eats you.

5

EVERY WEEK

Five concrete action steps, one per working day, written where you can see them.

52

EVERY YEAR

Even one or two real steps a week beats what most people attempt in a month, and compounds past your goal.

> ***Consistency beats intensity. Every single time.***

This week's page

Start each week with a single page. Four boxes keep the week pointed at your goals:

THE BIG ROCKS FOR THE WEEK

The five concrete steps, one per day, that move your goals forward.

TAKING CARE OF MYSELF

Health, family, rest. The fuel for everything else on the page.

REACH OUT TO FIVE OF MY 50

One professional connection per day. Done weekly, it guarantees a quarterly touch with every one of your 50.

PROGRESS ON MY GROWTH AREAS

Achieve something on two or three of your growth areas this week.

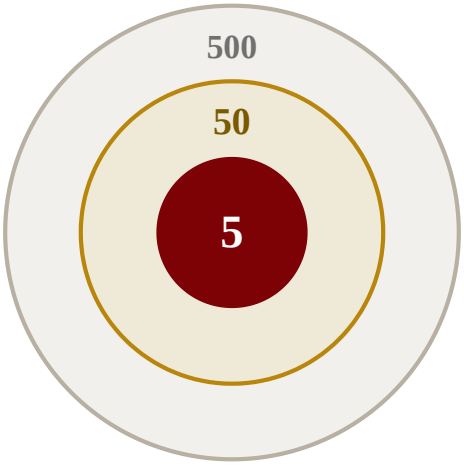
A SIMPLE TEST

On Friday, look at the page. Could you trace each big rock to a goal on your roadmap or your nest? If a rock doesn't trace to anything, it was busywork.

PART 3 · YOUR NETWORK

The 5 | 50 | 500 Network

You become the average of the people around you. So choose them the way you choose investments.



3 TO 5 MENTORS · Zone of personal development
The people who most influence who I become

50 EXPERTS · Zone of professional development
The people who are key to my professional growth

500 CONNECTORS · Zone of opportunity development
The people who connect me to anyone in the world

WORKING YOUR 5

- Set a regular check-in and get it on the calendar
- Update them on progress without adding an ask
- Ask for specific, targeted feedback, never "thoughts?"
- Be grateful. Their time is a valuable gift.

WORKING YOUR 50

- Actively follow their latest thinking
- Watch who else follows them; your next 50 are there
- Make yourself visible: write, share, ask real questions
- Be specific in outreach. Never ask to "pick their brain."

WORKING YOUR 500

- Connect on professional networks with people who interest you
- Connect with speakers and participants you meet
- Gather the names driving thinking in your field
- Collect. Review. Prune. Reach out when ready.

MAP YOUR 50 ACROSS YOUR GROWTH AREAS

List your growth areas across the top of a page, then name up to ten experts under each. Go through your contacts: how do you know them, and who still needs to be added? Map all three circles once a year. Then work them all year.

> ***Your network is built in the years you don't need it.***

PART 4 · THE RHYTHM

Make It a Rhythm, Not a Resolution

Goals are not a January event. They are an operating cadence, for the organization's nest and for yours.

CADENCE	WHAT HAPPENS
Daily	One step that moves a goal measurably forward.
Weekly	The Rule of 5: five concrete steps, one per day, on this week's page and visible on your desk.
Quarterly	Review the nest out loud with your leader: numbers, dates, blockers, and re-negotiations. Review your roadmap and your network map.
When the plan shifts	Re-nest within thirty days. A new priority, a reorganization, an acquisition: goals follow the plan, always.
Annually	Rewrite the page: mission check, growth areas, roadmap, network map. Share it with your leader and one mentor.

> **Share the page. A goal reviewed in private quietly dies.**

Getting started this week

1. **Write your foundation.** Draft your mission, vision, and five values. Imperfect is fine; written is required.
2. **Build your nest.** Fill in the four-line nested goal map, ideally with your leader.
3. **Write three to five goals,** each with a number and a date, and check each one against your leader's goals.
4. **Draft your roadmap** and your first week's page.
5. **Book the quarterly review** before you leave the room.

Three questions to carry with you

What do you want so much that you will invest your time in it and forgo other opportunities?

What are you focusing on to become your best self, and how will you measure your progress?

What will you stop doing? What will you start doing, and when?

> ***Goals move us. Goals shape us. Write them down. Nest them up. Review them out loud.***

WORKSHEET 1

My Foundation and My Nest

Name: _____ Year: _____

MY MISSION · WHY DO I EXIST?

MY VISION · WHERE WILL I BE IN FIVE YEARS?

MY VALUES · THE FIVE PRINCIPLES THAT GOVERN MY CHOICES

1.
2.
3.
4.
5.

MY NESTED GOAL MAP

THE ORGANIZATION PRIORITY I SERVE

MY LEADER'S GOAL · IN THEIR WORDS, WITH THEIR NUMBER

MY THREE TO FIVE GOALS · EACH WITH A NUMBER AND A DATE

#	GOAL	NUMBER	DATE	NEST / GROW
1				
2				
3				
4				
5				

WHAT CASCADES TO MY TEAM

WHAT COMES OFF MY PLATE TO MAKE ROOM

SIGNED WITH MY LEADER · QUARTERLY REVIEW DATES

WORKSHEET 2

My Roadmap and This Week's Page

Year: _____

MY ROADMAP · ONE GOAL PER GROWTH AREA

GROWTH AREA	MY GOAL (NUMBER + DATE)	ACTION STEPS BY QUARTER	PEOPLE AND RESOURCES	BARRIERS
		Q1 · Q2 · Q3 · Q4		
		Q1 · Q2 · Q3 · Q4		
		Q1 · Q2 · Q3 · Q4		
		Q1 · Q2 · Q3 · Q4		
		Q1 · Q2 · Q3 · Q4		

MY 5 | 50 | 500

MY 3 TO 5 MENTORS

50 EXPERTS: FIRST NAMES TO ADD

500 CONNECTORS: WHERE I WILL FIND THEM

THIS WEEK'S PAGE

Week of: _____

THE BIG ROCKS · ONE PER DAY

Mon _____

Tue _____

Wed _____

Thu _____

Fri _____

TAKING CARE OF MYSELF

REACH OUT TO FIVE OF MY 50

PROGRESS ON TWO OR THREE GROWTH AREAS THIS WEEK