

WELCOME TO **'BUSINESS NAME'**

"If you think you can, you're right. And if you think you can't, you're also right." – Henry Ford

The purpose of this workbook is to align our new team members, ensure a collective understanding and have everyone thinking the right way about {business name}, to learn more about YOU, and to make you aware of the strategies and key principles that we use here at {business name}.

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WELCOME ABOARD

(insert your welcome letter e.g.)

12 January 2024

Dear Lynn,

Welcome to the team! We are looking forward to having you onboard!

Before your first day we would like you to know the way I lead team members and in which we coexist, so it is WIN/WIN for all team members. Please read the following VERY THOROUGHLY and 3 TIMES. If you're in agreement with these points please sign at the bottom of this letter.

By agreeing to work with me, not for me (there is a big difference) you agree to these points:

1. My Style

- ✓ Open; straightforward; what you see is what you get. I play no games and have no hidden agendas. I say what I mean; there is nothing to read between the lines.
- ✓ Action oriented- fair, but somewhat impatient. I value the action and accomplishment; I dislike rationalisations and excuses.
- ✓ Want no surprises. If the sky is falling, tell me. I don't want to learn about it by reading a newspaper.

2. Always Play 'Above the Line'

- ✓ Ownership
- ✓ Accountable
- ✓ Responsible

And Not 'Below the Line'

- ✗ Blame
- ✗ Excuses
- ✗ Denial

3. Never Overpromise; Always Overdeliver

- ✓ A promise made is a promise kept. Never over promise; always over deliver. I've lived by these words throughout my entire career.
- ✓ Believe in alignment and linkage- people working together with strong team input make the best decisions.
- ✓ My key function is to set direction; allocate resources; and provide support. Your key responsibility is to get the results agreed upon in objectives and priorities. I want it clear that my people have a lot of autonomy to act and complete accountability to achieve.

4. Level The Silos, Increase The Sharing

- ✓ The more communications, cooperation, and support, the further and faster we will go. If sharing is increased, silos levelled, and alignment improved, great results will follow.
- ✓ Innovation (Improvement) must be applied in all aspects of business; innovation must define how we think and act.

5. Stealing

Any form of stealing is frowned upon and depending on the severity will be referred onto the proper authority. That includes time – I've happy for you to take the odd personal call/text message/email etc., that's cool. However, I'm not OK for you to surf the internet or SMS all day long etc., as we have an important job to do in adding value to our clients.

6. My Expectations Of You

- ✓ Outstanding performance. Promises must be kept: we make our numbers; we do what we say we will do. This is another precept that underscores the need for excellence and accountability.
- ✓ Support decisions once made; contribute before decisions are made. Nothing is worse than someone who sits silently during a decision-making process and then, after the fact, seeks to undercut the action. I don't tolerate efforts that subvert.
- ✓ Help one another work out problems. Sometimes its pride, or fear of losing authority and standing, but peers are often reluctant to seek help from one another, even though they all are part of the same team. I do everything I can to break down that attitude.
- ✓ **Do the RIGHT Thing.**
- ✓ **Do the BEST You Can.**
- ✓ **Show Other People That You CARE!**

7. Untangling Tough Issues

- ✓ Integrity- moral, ethical, legal. Integrity is the starting point for all business decisions. I always say that you can resolve the most difficult and entangled issue if you just "Do the right thing." Always be guided by that rule. Do what's right and you'll never go wrong.
- ✓ Be leaders of your business, your function, and your people. Upgrade your organisation continuously. Since I want this company to be the best in the world, I need a team of top performers- leaders who will be the best at running their business unit or function and in managing and developing their people. Continuous dissatisfaction must characterise the leader, which results in continuous improvement and upgrading throughout his or her operation.

8. Regular Team Meetings

Why?

- ✓ Want first hand update on the business
- ✓ Business conditions warrant it
- ✓ Helps assure alignment
- ✓ Share what's going on so you can do your job and gain full executive communication

9. No Gossip

- ✓ If your communication methods include nattering and gossiping in order to lay blame when you do not get your way, this may not be the right role for you.
- ✓ GOSSIP DESTROYS ORGANISATIONS
- ✓ Gossip (def.) – communication irresponsibly delivered to anyone other than the source of the problem.

10. Always Consensus, Often Unanimous

Decision process

- ✓ Consensus – all views heard
- ✓ Final decision by me, as needed

Behaviour

- ✓ Pay attention: no sidebar conversations or secondary tasks; Really listen
- ✓ Stick to subject
- ✓ Openness
- ✓ Pework: preparation when needed
- ✓ Jokes, fun are OK
- ✓ Minimise Grandstanding

11. Impress with accomplishments, not with number of meetings and memos

- ✓ Less is more. Meetings, paper, attendees. Some people believe they impress you with the number of memos and plans they send and meetings they schedule. I want to make sure that regular team meetings serve their purpose, which is to limit the need for interim communications, meetings, etc.
- ✓ No such thing as a “casual meeting” with outsiders like bankers, the media or competitors, etc. Most senior people know how risky meetings, even supposedly off-the-record meetings, can be with outsiders who easily can misinterpret and misuse the information provided.

If you are here to get the job done, to learn, to support the team and the planet, and to have a great time – WELCOME!!

Name

Date

Signature

OUR VISION STATEMENT

(insert your Vision Statement e.g.)

“Financial and social change through
skill and mind-set advancement”

OUR MISSION STATEMENT

(Insert your Mission Statement e.g.)

Guided by relentless focus, we will constantly strive to implement the
critical initiatives required to achieve our vision.

In doing this, we will deliver operational excellence in every corner of the
Company and meet or exceed our commitments to the many constituencies
we serve.

All of our long-term strategies and short-term actions will be molded by a set
of core ‘Points of Culture’ that define each and every member of the team.

OUR POINTS OF CULTURE

(Insert your Points Of Culture e.g.)

1 EXCELLENCE

Good isn't good enough. I always deliver products and services of exceptional quality that add value to the organisation and planet.

2 INNOVATION

I am creative. I always think and look beyond the boundaries for a new solution. I look for ways to do more with less and stay on a path of constant and never-ending improvement.

3 AGREEMENTS

I make honest and fair agreements with myself and others. I realise my integrity is my agreement.

4 CHANGE

For things to change, first I must change. I embrace change.

5 TEAMWORK

I am a team player and team leader. I do whatever it takes to stay together and achieve team goals. I focus on co-operation and always come to a resolution, not a compromise. I am flexible in my work and able to change if what I'm doing is not working. I ask for help when I need it and I am compassionate to others who ask me.

6 KNOWLEDGE

I am constantly looking for ways to enhance my knowledge and education and share it with those around me. I know knowledge and success are closely inter-related.

7 HONESTY

I am honest and transparent in my communication and tell the truth with compassion.

8 MASTERY

I am devoted to putting in time, actions, understanding and practise towards the pursuit of life mastery in every endeavour.

9 PERSISTENCE

I am disciplined and persistent in my work, so my results, growth and success are consistent. Persistence and determination alone are omnipotent. I am "The Extra Mile"

10 WIN / WIN

I give myself and others permission to win. Abundance is all around me and plenty for all.

11 GRATITUDE

I am forever grateful for the remarkable life I've had and will continue to have. I embody gratitude for everything around me which flows to all people I encounter.

12 COMMUNICATION

I speak positively of my fellow team members, my clients and my company in both public and private. I speak with good purpose using empowering and positive conversation. I frequently communicate with my team by meeting regularly. I acknowledge what is being said as true for the speaker at the moment and I take responsibility for responses to my communication. I only ever discuss concerns in private with the person involved and I always apologise for any upsets first and then look for a solution.

13 CONTRIBUTION

I give abundantly and contribute to the planet and humanity.

Section 1: My Goals Worksheet

A guide to setting achievable personal goals and career goals

In this section:

- Personal and Business Goals
- SMART Goals
- Business Challenges

GOALS WORKSHEET

It is important you put some thought into your answers and be as specific as you can.

Name:

YOUR PERSONAL GOALS

1. What are your personal goals, in other words what do you want to achieve out of life?

(When answering this question consider the things you want to do, the places you want to go and the experiences you want to have in your life – e.g.: travel, events, hobbies, important people in your life, health, family and friends as well as the physical things, toys and ‘stuff’ – e.g.: houses, cars, boats, gadgets, jewellery, furniture, art, clothes, investments etc)

2. How do you see yourself achieving these goals?

YOUR CAREER GOALS

Now that you are clear on what you want personally from life, I want you to now think about your career and how this will contribute to achieving your personal goals ...

1. So, tell me, why do you want to work with this company in the first place?

2. What do you hope to achieve, what are your goals and ambitions?

3. How many of those goals have been realised in the time you've been working?

4. Considering this, what are your goals NOW for your career?

(When answering this question consider things like your vision – e.g.: what does your career stand for, what do you want your career to be recognised for?)

DEVELOPING SMART GOALS

SMART is a system designed to give you the best chance of achieving your goals. SMART goals prevent you from creating goals that are too “soft and fluffy”. It stands for:

- Specific
- Measurable
- Achievable
- Realistic
- Timebound

These are key things you should keep in mind when setting goals to make sure you’re setting them correctly from the start. Please aim to make your goals “SMART” when setting your goals in this section.

Here are some examples to get you thinking:

- To consolidate \$20,000 debt by February 2025
- To pay off the mortgage by the Year 2028
- To win Employee of the Year 2025
- To lose 12 kg and run a half marathon under 4 hours.
- To have 3 weeks holiday and drop the kids to school two days a week.

Now, being as SMART as you possibly can, what are the 4 goals you want to achieve in your career and your 1 goal you want to achieve in your personal life?

1. _____
2. _____
3. _____
4. _____
5. _____

YOUR CHALLENGES – GOOD AND BAD

Thanks for that information. That will give us a lot better idea of what you're looking for out of your career, and life. So now can you tell me ...

1. What do you feel you are good at, what do you do that no one else does?

2. What do you feel you do poorly, or you could do better at?

3. Do you have any current challenges you are dealing with now?

4. If there was just one thing we could do for you right now, what would it be?

Section 2: Generalised Principles

What you'll need for this section:

- An open mind
- Access to YouTube to watch these videos

GENERALISED PRINCIPLE 1: PARTICIPATE

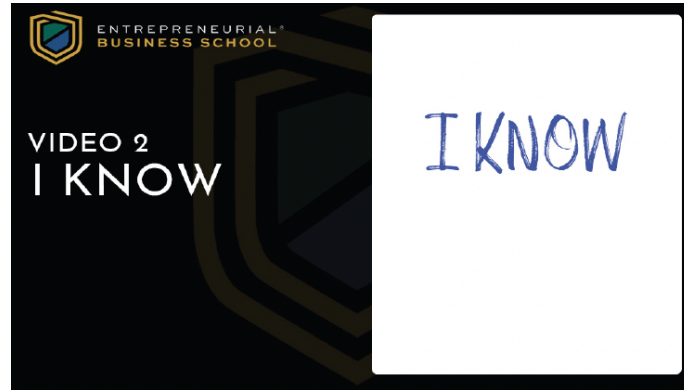


Before starting this section, please watch: <https://youtu.be/UsyXuXZF56c>

I need your agreement that you will participate 100%. I need your permission to hold you accountable for participating 100%.

Question: Name a time in your career and/or life where you didn't participate at 100% and had a less favourable result:

GENERALISED PRINCIPLE 2: “I KNOW”



TO MAKE SURE YOU GET THE
MOST OUT OF YOUR LEARNING:



Before starting this section, please watch: <https://youtu.be/JEghUGVg5r8>

Throughout your employment, you'll be challenged you on things that you don't know.
“What got you to here, won't get you to there.”

Question: Name a time where you thought you were 100% right, only to find out at a later time you were wrong:

GENERALISED PRINCIPLE 3: NO MORE 'BUT'S'

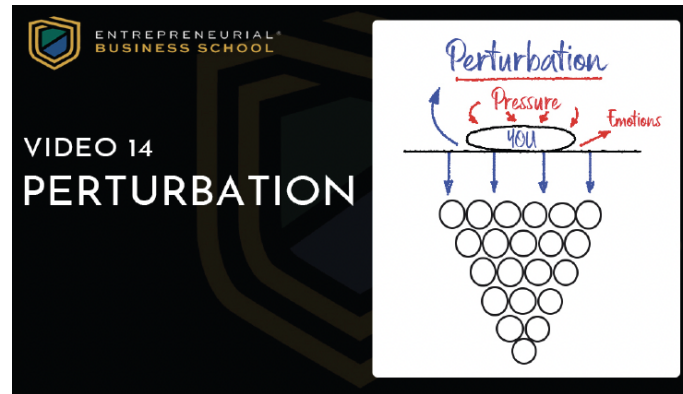


Before starting this section, please watch: <https://youtu.be/qxNyJwEgbAo>

Question: Are you “flat lined”? Name the last time you said “but” – and where you could have used positive phrasing to increase your triangle of possibility.

Train yourself to eliminate the word 'but' from your vocabulary!

GENERALISED PRINCIPLE 4: PERTURBATION



Before starting this section, please watch: https://youtu.be/5-oBw_smODo

Perturbation is a scientific principle about your comfort zone and what you do when you come across obstacles and your ability to push past them. The reality is that you will feel perturbation throughout your career.

Question: What are you going to do when perturbation shows up?

Question: What are some goals you'd like to set but feel they are outside of your comfort zone?

CONGRATULATIONS ON FINISHING THE WORKBOOK

Have you done the following? (Please tick)

- ☐ Gone over your notes?
- ☐ Answered all the questions in this workbook, your goals and signed them off?

Signed..... Date.....

Signed..... Date.....

