**Success Sheet – Role and Goals [Sample]**

*This document lays out the specific pieces of what this role is responsible for (the “what”), the ways to successfully approach the work (the “how”), and what success in this role looks like over a particular period of time (goals). If relevant, paste the “how” elements into your performance evaluation in Section II of the form.*

**I am the CEO of making sure everything in our office runs smoothly.**

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| **My Goals, 2017** |
| We will successfully move our office for less than $X and with no more than one day of staff downtime.    All meetings requested by my manager have been scheduled within 48 hours; a first attempt to schedule is made the same day request is received; all urgent requests are satisfied within the appropriate timeframe.    On a scale from 1 to 5, my manager averages 4.5 when asked each week if his/her calendar reflects his/her highest priorities.    When surveyed, staff answer an average of 4.5 (on 5 point scale) when asked “I have the office space, materials, and administrative information I need in order to do my job.” |

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| **My Role** |

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| **THE “WHAT”:**  **Administration/Operations: office space is functional and everyone has what they need to do their jobs well**  o Own all general maintenance; everything should work well!  o Ensure all systems work effectively (phones, internet, etc.)  o Support additional administrative needs of office (faxing, mailing, PDFs, supplies, etc.)  **Calendar and Internal Meetings: manage calendars and implement internal meeting structure**  o Manage staff calendars to priorities (surfacing questions, getting aligned on tradeoffs, ensuring enough space/travel time between things, etc.)  o Implement internal meeting schedule (e.g., check-ins, monthly step-backs, team step-backs)  **Tech and Systems: technology is appropriate to meet needs of growing team and we have the systems in place and working to gather, share, and track information**  o Ensure all staff have hardware and software they need  o Ensure we have appropriate data back-up system and that it’s working effectively  o Spot opportunities to better track and maintain information | **THE “HOW”:**  **100% follow-through:** No dropped balls policy! Stay on top of all specific tasks/follow-up items and general areas of work; consistently meet deadlines.  **Customer service orientation:** Make it easy for staff to do their jobs; view the work as supporting the whole and integral to the team’s effectiveness.  **Attention to detail:** Everything going out (other than internal communication) is polished – meaning accurate (right content, no misspellings, grammatical errors, etc.), precise (reflects nuances, captures subtleties) and “fits” the situation (has our “look and feel” generally but can be casual when situation calls for it).  **Positive attitude and flexibility:** Approach work with a spirit of “yes”; strike a positive tone; push work forward through obstacles and adapt quickly as things change (which they inevitably will!). |

**Success Sheet – Role and Goals [Template]**

**I am the CEO of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

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| **My Goals, 2017** |
| *Fill in goals here.* |

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| **My Role** |

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| **THE “WHAT”:**  *Fill in what this role is responsible for.* | **THE “HOW”:**  *Fill in the keys for success in this role.* |