

Objective Setting: Manager Guide

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Go to your SuccessFactors homepage and click on the **To-Do** tile.

Navigate to the **Objectives for Manager Approval** form for your teammate.



Scroll down to see your Objectives or click on **Objectives** to jump to that section.



Click on **Add Objective** to enter a new objective.



Edit an objective by clicking on the pencil icon.



Performance | Search for actions or peo... | DAI | DATA ANALYSIS INCORPORATED

Reviews | Team Overview

Back to: To-Do | Objective Setting 2022 for Heather Hall | Actions | History | [Icons]

Heather Hall | [Progress: 0] | [Messages: 0] | [Comments: 0]

Route Map | Introduction | User Information | Review Dates | **Objectives**

Objectives | [+ Add Objective](#)

Use this section to evaluate each business objective established for this review period. For each goals, describe performance expectations, how results were measured, and the results that were achieved, using the comment area.

Financial
Develop and implement new staffing plan for investor inquiries mailbox [Pencil Icon] [Trash Icon] | 35.0% of total score | Not Started

Investor inquiries mailbox response time decreases to one business day.

Achievements | Objective Details

There are no Achievements.

Financial
Perform updates of social media marketing materials, including visuals and copy. [Pencil Icon] [Trash Icon] | 35.0% of total score | Not Started

One new social media post a week with updated branding and copy.

Support

Review **ALL** details for each objective.



Prepare questions or suggestions for your 1:1 Meeting with your teammate.



- 1) The category of the objective
- 2) The objective description
- 3) The definition of success
- 4) The weight for the goal
- 5) The start and due date
- 6) The current status
- 7) **Important:** Save Changes after editing



Add Objective

Edit your objective below.

Fields marked with * are required.

Category: Financial 1

Type: Personal

* Objective: Perform updates of print media and other collateral marketing materials 2
spell check... legal scan...

* What does Success look like?: _ (#) of items revised/updated 3
spell check... legal scan...

* Weight: 35.0 % 4

* Start Date: 01/01/2022 5

* Due Date: 12/31/2022 6

Status: Not Started 7

Cancel
Back
Save Changes

Discuss the objectives with your teammate and make any edits or additions during your 1:1 meeting.



Click **Approve Objectives** to finalize the form.



Click **Approve Objectives** again to complete the process.



Reviews Team Overview

Back to: To-Do

Objective Setting 2022 for Heather Hall

Heather Hall 0 0 0

Route Map Introduction User Information Review Dates Objectives

There are no Achievements.

Financial

Perform updates of social media marketing materials, including visuals and copy. 35.0% of total score
Not Started

One new social media post a week with updated branding and copy.

Achievements Objective Details

There are no Achievements.

Financial

Establish processes to ensure consistency and quality control for market research projects by end of year. 30.0% of total score
Not Started

5-10 market research criteria established
New quality control processes developed, vetted, and implemented consistently for Q4.

Achievements Objective Details

There are no Achievements.

Cancel Save and Close Send Back to Employee **Approve Objectives**

Approve Objectives

You're about to submit this form for completion. A copy of the form will be sent to your Completed folder.

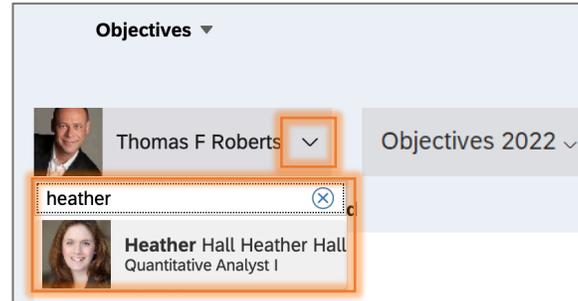
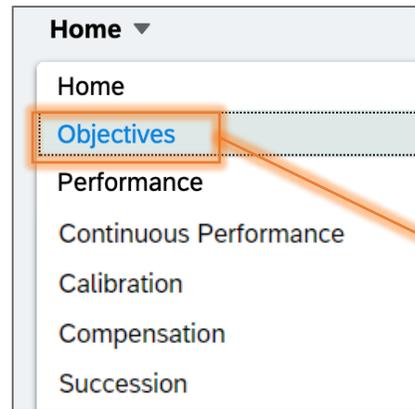
Cancel & Return to Form **Approve Objectives**

To see teammate objectives after form approval, go to your Home Page and navigate to **Objectives**.

Click on the arrow next to your name and search for your teammate. Click on their icon to go to their objectives.



To make further changes, ensure the goal plan is unlocked and click **Edit** underneath the objective.



Objective Status: **Goal Plan Unlocked** [Lock Goal Plan](#)

Introduction

Management by objectives (MBO) is a strategic management model that helps all of us drive performance of our organization by clearly defining objectives that are agreed to by both leaders and teammates. By working collaboratively in the establishment of objectives, both the teammate and leader have an opportunity to mutually agree on commitments to achievements that are aligned with enterprise wide objectives. During this process, you will design a list of objectives with assigned dollar amounts for the achievement of those objectives. The objectives should be designed in a SMART format: Specific, Measurable, Achievable, Relevant, and Time-bound. This is a great opportunity for both the leader and teammate to connect and drive amazing things for the O'Neil family of companies! If you need support or have any questions as you embark on this exciting process, please reach out to your People Partner.

Displaying 1-3 of 3 Objectives

Total Weight: 100.0% (Min:3, Max:10)

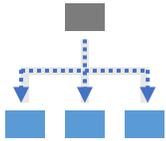
| Visibility | Objective | What does Success look like? | Weight | Start Date | Due Date | Status | CPM Achievements | Action |
|---------------------------------|--|---|--------|------------|------------|-------------|------------------|--------|
| | Objective aligned up from Thomas F Roberts: Respond to investor inquiries with one business day. | Inquiry response rate is down to one business day at a maximum. | 25.0% | 01/01/2022 | 12/31/2022 | Not Started | | |
| <input type="checkbox"/> Public | Develop and implement new staffing plan for investor inquiries mailbox. Edit | Investor inquiries mailbox response time decreases to one business day. | 35.0% | 01/01/2022 | 12/31/2022 | Not Started | 0 | |

Alert - Linked by Thomas F Roberts 2/4/21 4:30 PM

All objectives will be listed on this form, and you can quickly view the status and weight of each.

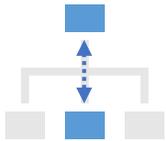
| Question | Answer |
|---|---|
| How many objectives should I have? | We recommend creating 3-5 objectives at the beginning of the year. You can always add more, but it is best to keep the total number under 10. |
| How often should I update the objectives? | Update the status of your objectives at least quarterly, and make sure to have a conversation with your manager about your updates. Your manager can also see edits you have made through the Objectives screen in SuccessFactors. To add, edit, or remove objectives, discuss with your managers first. |
| Where can I see examples of SMART goals? | Go to SuccessFactors → Objective → Add New Objective → Library Objectives. SMART objectives are organized by category and ready to be added to your form! |
| What happens if my manager doesn't give me any objectives? | Your manager may not cascade any goals to you, but you can still develop your own objectives and propose them to your manager. If your manager is not open to this discussion, ask your People Partner to meet to facilitate the conversation. |
| What should I do if I have been assigned an Objective that I think is impossible to complete? | First, review the objective carefully and identify which parts seem unrealistic. Is the timeline rushed, or is the scope of the project too broad? Would you need more resources to accomplish the goal? Talk to your manager about your specific concerns to help them understand the road to accomplishing this objective. |
| What if I receive an objective that I cannot complete until someone achieves their objective? How can I make sure they get it done so I can accomplish my objective? | Bring this dependency to your manager's attention to ensure they are aware. We encourage you to coordinate your project with all involved parties so that everyone can plan their efforts accordingly. Remember- objectives are updated quarterly! If the scope or status or your objective changes, you will have a chance to discuss with your manager. |

| Question | Answer |
|---|--|
| <p>What if I disagree with a teammate on an objective or a weighting? Who gets the ultimate say?</p> | <p>As the manager, you ultimately decide which objectives should be included in your yearly plan. However, it is important to talk to the teammate and understand why they want to include or delete an objective before you make your decision. Keep in mind that as priorities shift or objectives get completed that you can always revisit this conversation and add other objectives.</p> |
| <p>How do I cascade Objectives and edit them as they get pushed down?</p> | <p>Go to SuccessFactors → Objective → Click on the checkmark next to the objective → Action → Cascade → Select Teammate → Edit Objective → Cascade. We also have a cheat sheet with detailed step by step instructions and screenshots.</p> |
| <p>What happens if we need to add or remove an objective during the year?</p> | <p>You should make the edits to the objectives in SuccessFactors. Before you exit the form, check to ensure that the total weight of your current objectives adds up to 100%. If not, make further edits.</p> |
| <p>What about team or department objectives? How do we enter those?</p> | <p>All objectives should be translated to the level of the individual teammates when they are entered into SuccessFactors. You can create team objectives, cascade objectives, or link objectives to ensure consistency and visibility across objectives for your team.</p> |
| <p>What if I don't give objectives to my teammates?</p> | <p>Objectives are critical to ensuring we execute on our enterprise-wide goals, and they provide clear expectations for our teammates as they do their day-to-day work. As managers, it is your responsibility to direct the work of your teams. Your teams can develop objectives, but it is up to you to make sure you focus their efforts and clearly outline success.</p> |
| <p>What if I haven't heard from my execs on the business strategy?</p> | <p>Please reach out to your business leader, or inquire with your People Partner.</p> |
| <p>What if my teammate's objective is contingent on the work of another teammate?</p> | <p>Our work is complicated, so dependencies happen! As a manager you can ensure that the lines of communication stay open so that everyone involved can plan accordingly. Ensure that you update objectives regularly and link the objectives so that you can maintain visibility.</p> |



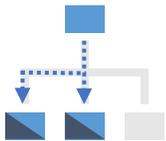
Create Group or Team Objectives
When you want to:

- Assign identical objectives and weighting to multiple teammates
- Distribute effort toward an objective equally



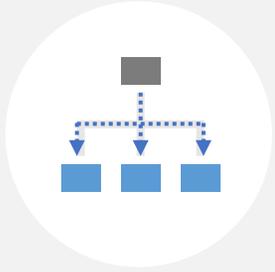
Link your own Objectives to a teammate's objective
When you want to:

- Easily monitor the progress of another goal
- Maintain visibility of an objective that your work depends on, or an objective that is dependent on your work.



Cascade Objectives
When you want to:

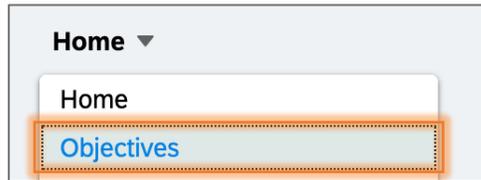
- Make a teammate responsible for all or part of the goal
- Capture the teammates contribution to an overall goal
- Create alignment in efforts



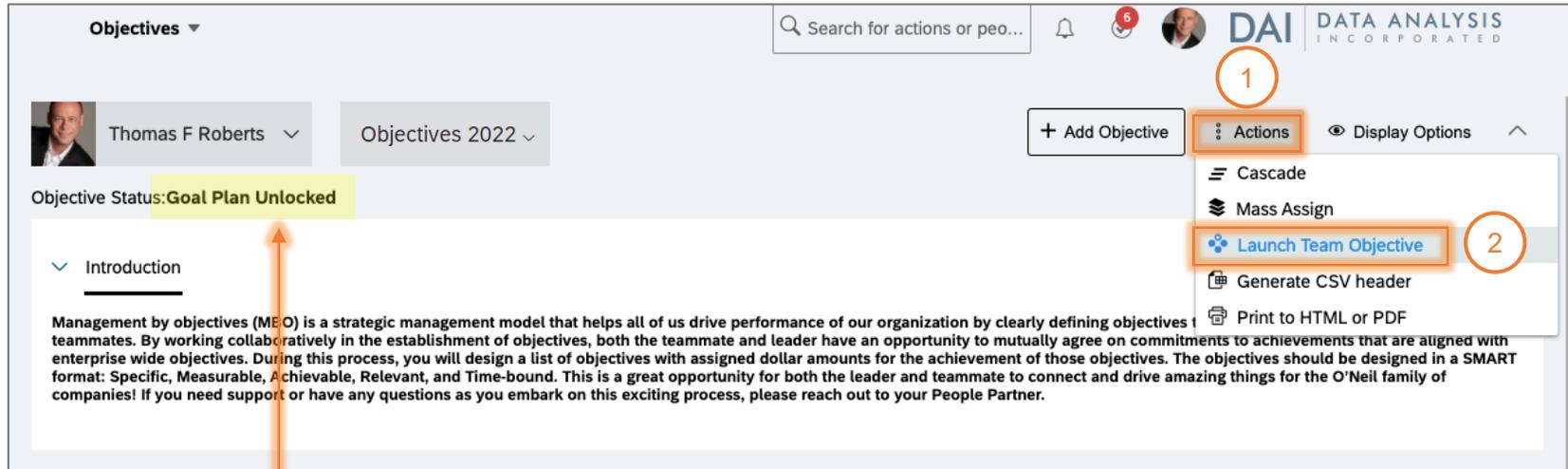
Create Group or Team Objectives
When you want to:

- Assign identical objectives and weighting to multiple teammates
- Distribute effort toward an objective equally

To start, go to your SuccessFactors homepage and navigate to Objectives.



Click on Actions and select Launch Team Objective.



Check that your goal plan is unlocked first, otherwise you cannot make edits.

This is the team objectives page. Click on **Create Team Objective**.



Enter the objective details.

Remember: all details will be the same for all teammates!

Save Changes when complete.



Objectives ▾ Search for actions or peo... DAI | DATA ANALYSIS INCORPORATED

Objective Panel
Team Objective

> Search Team Objective **Create Team Objective**

| Team Objective Name | Created On | Modified On | Created By | Assigned To | Actions |
|---------------------|------------|-------------|------------|-------------|---------|
|---------------------|------------|-------------|------------|-------------|---------|

Create a Team Objective

Enter your Objective and Metrics below

Fields marked with * are required.

Category: Customer **1**

Type: Team

* Objective: Conduct bi-monthly pulse surveys with your customers and compile results twice a year. **2**

* What does Success look like?: - Surveys are sent out every other month
- Reports are summarized and sent to manager twice a year **3**

* Weight: 15.0 % **4**

* Start Date: 01/01/2022 **5**

* Due Date: 12/31/2022 **6**

Status: Not Started **6**

7

Cancel **Save Changes**

- 1) The category of the objective
- 2) The objective description
- 3) The definition of success
- 4) The weight for the goal
- 5) The start and due date
- 6) The current status
- 7) **Important: Save Changes** after editing

This objective is now listed on your Team Objectives page, but not assigned.

Click on the **Action** icon and select **Assign** to select teammates.



Select the recipients for the objective
Click **Next**.

Click on **Objective Panel** to go back to your objectives page.



Objectives ▾ Search for actions or peo... DAI | DATA ANALYSIS INCORPORATED

Objective Panel
Team Objective

> Search Team Objective Create Team Objective

| Team Objective Name | Created On | Modified On | Created By | Assigned To | Actions |
|--|------------|-------------|------------------|-------------|---------|
| Conduct bi-monthly pulse surveys with your customers and compile results twice a year. | 2/11/22 | 2/11/22 | Thomas F Roberts | 0 | |

- Edit
- Delete
- Share
- Assign
- Unassign

Step 1. Select Recipients

Step 1 of 2. Select the recipients you want to assign the objective.

Recipient Hierarchy

| <input type="checkbox"/> | Name | Title | Number of Team Members | Assigned | Objective Plan State |
|-------------------------------------|------------------|--------------------------------------|------------------------|----------|----------------------|
| <input type="checkbox"/> | Steven L Birch | Chief Investment Officer | 7 | | Goal Plan Unlocked |
| <input type="checkbox"/> | Thomas F Roberts | Quantitative Strategies Director, VP | 4 | | Goal Plan Unlocked |
| <input checked="" type="checkbox"/> | Joseph C Gray | Quantitative Analyst II | 0 | | Goal Plan Unlocked |
| <input checked="" type="checkbox"/> | Heather Hall | Quantitative Analyst I | 0 | | Goal Plan Unlocked |
| <input checked="" type="checkbox"/> | Robert Smith | Portfolio Manager | 0 | | Goal Plan Unlocked |
| <input type="checkbox"/> | Ana Williams | | 0 | | Goal Plan Unlocked |

Other Recipients Find Other Recipients

None

Cancel Next

Objectives ▾ Search for actions or peo... DAI | DATA ANALYSIS INCORPORATED

Objective Panel
Team Objective

> Search Team Objective Create Team Objective

| Team Objective Name | Created On | Modified On | Created By | Assigned To | Actions |
|--|------------|-------------|------------------|-------------|---------|
| Conduct bi-monthly pulse surveys with your customers and compile results twice a year. | 2/11/2022 | 2/11/2022 | Thomas F Roberts | 3 | |

The objective and number of teammates assigned is on the Team Objectives page.

You can access team objectives by clicking on **Launch Team Objective** at any time.

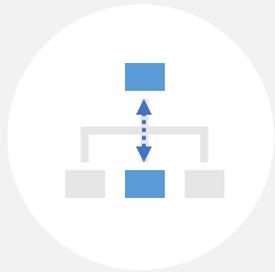


The screenshot shows the 'Objectives' interface for Thomas F Roberts. The 'Objective Status' is 'Goal Plan Unlocked'. Under the 'Introduction' section, there is a paragraph of text explaining Management by Objectives (MBO). The 'Actions' menu is open, and the 'Launch Team Objective' option is highlighted with an orange box.

Click the **Actions** button to edit the objective or to assign to additional teammates.

The screenshot shows the 'Team Objective' table. The first row contains the objective: 'Conduct bi-monthly pulse surveys with your customers and compile results twice a year.' The 'Actions' column for this row has a button with a dropdown menu open. The 'Assign' option in the menu is highlighted with an orange box.

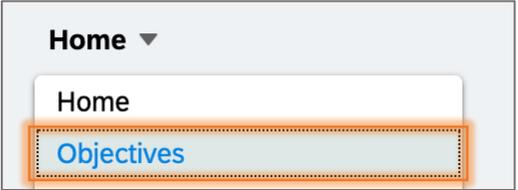
| Team Objective Name | Created On | Modified On | Created By | Assigned To | Actions |
|--|------------|-------------|------------------|-------------|---|
| Conduct bi-monthly pulse surveys with your customers and compile results twice a year. | 2/11/22 | 2/11/22 | Thomas F Roberts | 3 | [Edit, Delete, Share, Assign, Unassign] |



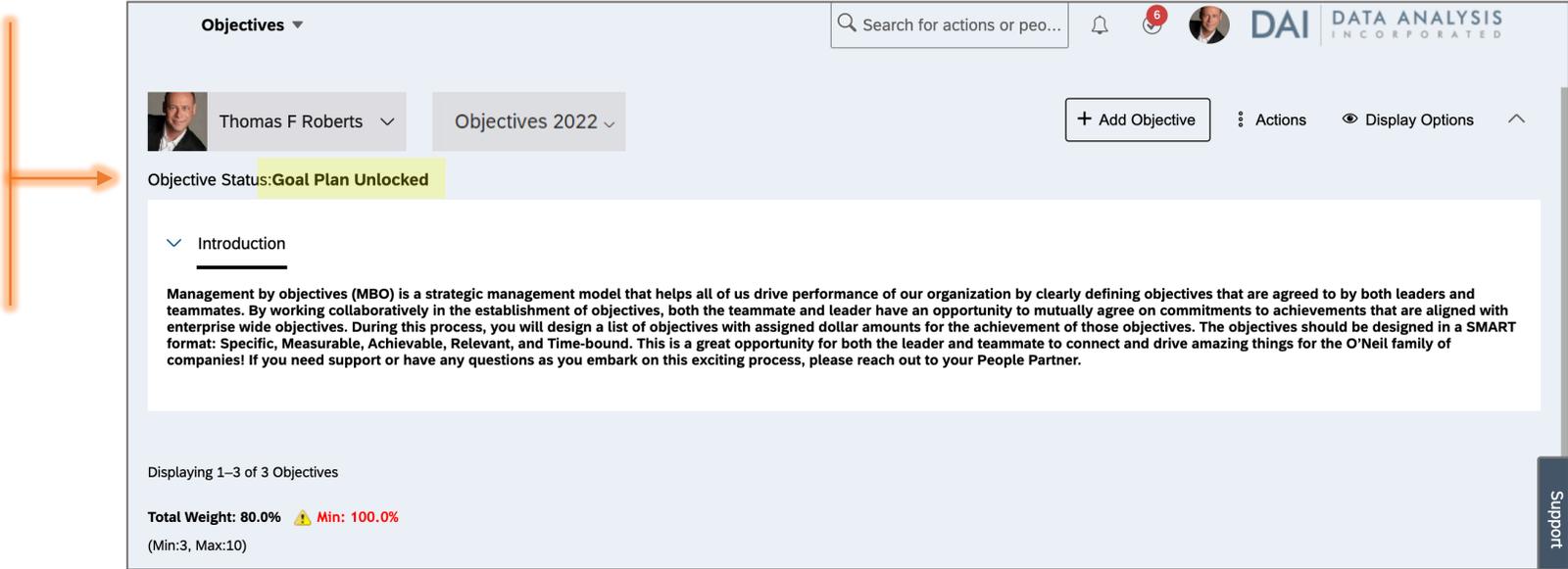
Link your own Objectives to a teammate's objective
When you want to:

- Easily monitor the progress of another goal
- Maintain visibility of an objective that your work depends on, or an objective that is dependent on your work.

To start, go to your SuccessFactors homepage and navigate to Objectives.



Check that your goal plan is **unlocked** first, otherwise you cannot make edits.



Click on the checkbox next to your objective to select it.

Click on the Action icon on the far right to and select **Link to another Employee's objective.**



Objectives ▾

Search for actions or peo...

Thomas F Roberts ▾

Objectives 2022 ▾

+ Add Objective

⋮ Actions
👁 Display Options
⤴

Objective Status: **Goal Plan Unlocked**

Introduction

Management by objectives (MBO) is a strategic management model that helps all of us drive performance of our organization by clearly defining objectives that are agreed to by both leaders and teammates. By working collaboratively in the establishment of objectives, both the teammate and leader have an opportunity to mutually agree on commitments to achievements that are aligned with enterprise wide objectives. During this process, you will design a list of objectives with assigned dollar amounts for the achievement of those objectives. The objectives should be designed in a SMART format: Specific, Measurable, Achievable, Relevant, and Time-bound. This is a great opportunity for both the leader and teammate to connect and drive amazing things for the O'Neil family of companies! If you need support or have any questions as you embark on this exciting process, please reach out to your People Partner.

Displaying 1–3 of 3 Objectives

Total Weight: 80.0% ⚠ **Min: 100.0%**
(Min:3, Max:10)

Financial

| Visibility | Objective | What does Success look like? | Weight | Start Date | Due Date | Status | CPM Achievements | Action |
|-------------------------------------|-----------|---|--|------------|----------|-------------|------------------|---|
| <input checked="" type="checkbox"/> | Public | Implement a system to provide online monitoring of vendors Edit | Online monitoring implemented by October 1. <div style="width: 30%;"><div style="width: 30%;"></div></div> 30.0% | 01/01/22 | 10/01/22 | Not Started | 0 | 2 ⋮ |

1

3

Edit objective

View objective detail

Link to another Employee's objective

Add objective to Outlook

Support

Select the teammate and **Next**.



Choose from their list of objectives and click **Next**.



Review the linked objectives and confirm by clicking **Link**.

1 Step 1. Select Recipient

Step 1 of 3. Select the employee to whom you want to link the below objective.
Implement a system to provide online monitoring of vendors

Employee Hierarchy

| Name | Title | Number of Team Members | |
|--|--------------------------------------|------------------------|---|
| <input type="radio"/> Steven L Birch | Chief Investment Officer | 7 | > |
| <input type="radio"/> Thomas F Roberts | Quantitative Strategies Director, VP | 4 | > |
| <input checked="" type="radio"/> Joseph C Gray | Quantitative Analyst II | 0 | > |
| <input type="radio"/> Heather Hall | Quantitative Analyst I | 0 | > |
| <input type="radio"/> Robert Smith | Portfolio Manager | 0 | > |
| <input type="radio"/> Ana Williams | | 0 | > |

Other Employees [Find Other Employees](#)

None

2 Step 2. Select Objective

Step 2 of 3. Select the objective to link to "Implement a system to provide online monitoring of vendors"

Total Weight: 35.0% ⚠️ **Min: 100.0%**
(Min:3, Max:10) ⚠️ **Minimum Not Met**

Financial

| Visibility | Objective | What does Success look like? | Weight | Start Date | Due Date | Status | CPM Ad |
|---|---|---|--------|------------|------------|-------------|--------|
| <input checked="" type="radio"/> Public | Conduct detailed review of current vendors. | Create report of vendors used including length of contract an current relationship. | 20.0% | 01/01/2022 | 08/02/2022 | Not Started | 0 |

Customer

Step 3. Confirm Link

Step 3 of 3. Confirm Link

Please confirm that the following link relationship is correct:

Linking your objective:
Implement a system to provide online monitoring of vendors

To Joseph C Gray's objective:
Conduct detailed review of current vendors.

Displaying 1-3 of 3 Objectives

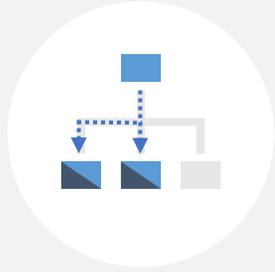
Total Weight: 80.0% ⚠️ **Min: 100.0%**
(Min:3, Max:10)

Financial

| Visibility | Objective | What does Success look like? | Weight | Start Date | Due Date | Status | CPM Achievements | Action |
|-------------------------------------|---|---|---|------------|------------|-------------|------------------|--------|
| <input type="checkbox"/> Public | Implement a system to provide online monitoring of vendors Edit | Online monitoring implemented by October 1. | <input type="range" value="30.0%"/> 30.0% | 01/01/2022 | 10/01/2022 | Not Started | 0 | ⋮ |
| <input checked="" type="checkbox"/> | Objective aligned down to Joseph C Gray: Conduct detailed review of current vendors. | Create report of vendors used including length of contract an current relationship. | <input type="range" value="20.0%"/> 20.0% | 01/01/2022 | 08/02/2022 | Not Started | | |



The linked objective is now listed in blue under your objective.



Cascade Objectives When you want to:

- Make a teammate responsible for all or part of the goal
- Capture the teammates contribution to an overall goal
- Create alignment in efforts

To start, go to your SuccessFactors homepage and navigate to **Objectives**.



Check that your goal plan is **unlocked** first, otherwise you cannot make edits.



Objectives ▾

Search for actions or peo...

Thomas F Roberts ▾ Objectives 2022 ▾

+ Add Objective ⋮ Actions 👁 Display Options ^

Objective Status: **Goal Plan Unlocked**

Introduction

Management by objectives (MBO) is a strategic management model that helps all of us drive performance of our organization by clearly defining objectives that are agreed to by both leaders and teammates. By working collaboratively in the establishment of objectives, both the teammate and leader have an opportunity to mutually agree on commitments to achievements that are aligned with enterprise wide objectives. During this process, you will design a list of objectives with assigned dollar amounts for the achievement of those objectives. The objectives should be designed in a SMART format: Specific, Measurable, Achievable, Relevant, and Time-bound. This is a great opportunity for both the leader and teammate to connect and drive amazing things for the O'Neil family of companies! If you need support or have any questions as you embark on this exciting process, please reach out to your People Partner.

Displaying 1-3 of 3 Objectives

Total Weight: 80.0% ⚠ Min: 100.0% (Min:3, Max:10)

Support

Click on the checkbox next to your objective to select it.

Go to **Actions** and click **Cascade**.



The screenshot shows the 'Objectives' page in the DAI system. At the top, there is a search bar and a user profile for Thomas F Roberts. A dropdown menu is open, showing the 'Actions' section with the 'Cascade' option highlighted. A table below lists objectives, with the first one selected via a checkbox. The table columns include Visibility, Objective, What does Success look like?, Weight, Start Date, Due Date, Status, and CPM Achievements.

| Visibility | Objective | What does Success look like? | Weight | Start Date | Due Date | Status | CPM Achievements | Action |
|--|--|---|--------------------------------------|------------|------------|-------------|------------------|--------|
| <input checked="" type="checkbox"/> Public | Implement new inventory management procedure and train team by June 2021. Edit | - procedures are documented and vetted - team has been trained -Monthly check in on procedure | <div style="width: 25%;">25.0%</div> | 01/01/2022 | 06/01/2022 | Not Started | 0 | ⋮ |



Select one or more recipient by clicking on the checkbox next to their name. Click **Next**.



Edit the objective to reflect the scope of the teammate's goal. Make sure to adjust the weighting when applicable! Click **Cascade** when complete.

1 Step 1. Select Recipients

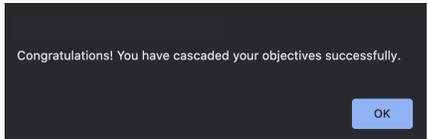
Step 1 of 2. Select the employees to whom you want to cascade the objective.

Employee Hierarchy

| <input type="checkbox"/> | Name | Title | Number of Team Members | Cascaded Objective Plan State |
|-------------------------------------|------------------|--------------------------------------|------------------------|-------------------------------|
| <input type="checkbox"/> | Steven L Birch | Chief Investment Officer | 7 | Goal Plan Unlocked > |
| <input type="checkbox"/> | Thomas F Roberts | Quantitative Strategies Director, VP | 4 | Goal Plan Unlocked |
| <input type="checkbox"/> | Joseph C Gray | Quantitative Analyst II | 0 | Goal Plan Unlocked > |
| <input type="checkbox"/> | Heather Hall | Quantitative Analyst I | 0 | Goal Plan Unlocked > |
| <input checked="" type="checkbox"/> | Robert Smith | Portfolio Manager | 0 | Goal Plan Unlocked > |
| <input type="checkbox"/> | Ana Williams | | 0 | Goal Plan Unlocked > |

Other Employees [Find Other Employees](#)

None



A confirmation message will appear.

2 Step 2. Edit Objective

Step 2 of 2. You can edit the objective (optional) before cascading it to the selected recipients.

Fields marked with * are required.

Already Cascaded To: none

Category: Business Process

Type: Personal

* Objective: Assess current inventory management procedure and provide an overview of strengths and weaknesses by April 1.

* What does Success look like?: - current inventory management procedure is documented - strengths and weaknesses have been presented to manager

* Weight: 20.0 %

* Start Date: 01/01/2022

* Due Date: 04/01/2022

Status: Not Started

Note: you cannot edit the objective individually for each teammate if you cascade to multiple people. To cascade the objective with different deliverables or timelines, cascade to one person at a time!

| visibility | Objective | what does Success look like? | Weight | Start Date | Due Date | Status | CPM Achievements | Action |
|---------------------------------|---|---|---|------------|------------|-------------|------------------|--------|
| <input type="checkbox"/> Public | Respond to investor inquiries with one business day. Edit | Inquiry response rate is down to one business day at a maximum. | <input type="range" value="25.0%"/> 25.0% | 01/01/2022 | 12/31/2022 | Not Started | 0 | ⋮ |
| | Objective aligned down to Heather Hall: Develop and implement new staffing plan for investor inquiries mailbox. | Investor inquiries mailbox response time decreases to one business day. | <input type="range" value="35.0%"/> 35.0% | 01/01/2022 | 12/31/2022 | Not Started | | |

The cascaded objective is now listed in blue under your objective.

- 1) Carefully review the objectives set by your teammate to make sure they are **SMART** goals! Remember- these objectives outline your performance expectations for the year. The clearer, the better!
- 2) Take time to answer questions the teammate has about their objectives or about company or department strategy.
- 3) Prepare some questions to ask the teammate as well. Consider a few from the box to the right.
- 4) Remind the teammate that you will check in on objective progress often, and that you are a resource for them throughout the year.
- 5) Make any edits needed in SuccessFactors and ensure that the weighting of all objectives adds up to 100%.
- 6) Approve objectives at the end of the conversation.

Questions to ask during Objective Setting

- What obstacles should we anticipate?
- What else do you need to meet this goal?
- What can I do to support you?
- Would you like help in making a plan?
- What do you think will make the biggest difference?
- What do you think is the right way to approach this?
- What would we have to change to make [X] happen?
- What will you do first?