



MONTGOMERY, INC.

Goal Setting Workshop

Company Kickoff Summit

Set clear goals. Create ownership. Build momentum for the year ahead.

The Company Kickoff Summit is a one-day, high-impact workshop designed to align leadership and teams around a shared set of goals and a practical plan for execution. This is not a planning session that fades once the meeting ends. It's a structured experience that helps organizations move from intention to action, with clarity, accountability, and follow-through built in.

What This Workshop Is Designed to Do

The Company Kickoff Summit helps organizations:

- Align leadership and teams around clear priorities
- Establish SMART goals across departments
- Translate goals into actionable tasks with ownership
- Build accountability into day-to-day execution
- Create confidence and focus heading into the year

Participants leave with more than inspiration. They leave with a working roadmap.

How the Summit Works

Pre-Summit Strategy Session

Before the event, senior leadership meets to reflect on the prior year, review organizational changes, and identify the core goals that will shape the Summit. This ensures the workshop is tailored to the business and grounded in real priorities, not generic planning exercises.

The Summit Experience (Full Day)

Morning: Mindset & Alignment

The day opens with a focus on resilience and mindset, anchored by the keynote "*A Little Pain Never Hurt Anyone*." This is followed by a "North Star" alignment activity that visually reinforces how strong foundations support long-term growth.

Midday: SMART Goal Setting

Teams break into working groups to build SMART goals aligned to company priorities. Departments present and refine goals together, creating clarity and alignment across the organization.

Afternoon: From Goals to Action

Goals are translated into tasks with clear ownership, deadlines, and monthly milestones. A "football team" visualization reinforces how individual roles and accountability drive overall success. The outcome is a comprehensive Task & Accountability Tracker built for real-world use.

What Teams Leave With

- Companywide SMART goals
- Department-level action plans
- Clear ownership and accountability
- A living Task & Accountability Tracker
- A monthly due-date guide to support follow-through

Optional quarterly follow-up sessions are available to reinforce accountability, track progress, and realign priorities as needed.

Who This Workshop Is For

- Leadership teams setting annual or quarterly goals
- Organizations seeking stronger alignment across departments
- Teams struggling with execution or follow-through
- Companies preparing for growth, change, or transition

The Result

Stronger alignment. Clearer direction. Better execution. The Company Kickoff Summit equips leaders and teams with the structure, confidence, and momentum needed to deliver on their goals long after the day ends.