

How to balance short-term task planning with long-term vision

Balancing short-term tasks and long-term vision is hard — even great leaders struggle with this one. 61% of founders find it hard to connect their grand visions with their companies' day-to-day tasks. Many fall into the “urgency trap” and lose focus. Early-stage startups are most prone to this: they need to demonstrate strong traction here and now to secure funding while simultaneously developing a great product.

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As a head of operations at a VC firm, I assist our portfolio startups in resolving operational challenges, and this is always one of them. Here are 3 tips that might help strike a balance between short-term goals and long-term vision.

Align daily tasks with your vision

When each employee knows how their work helps the company's primary goal; when they have the freedom to complete tasks the way they want; when they know each colleague's responsibilities; and when they trust their leaders and corporate culture, you are running a well-aligned business.

Highly aligned companies grow 19% faster and are 15% more profitable, according to Forrester, a research and advisory company. But how does one make a business work this way?

There's Netflix's “leading with context and not control” mantra, or

Shopify's "highly aligned but loosely coupled" approach. They work when there's a corporate culture to support them. If you're still a small team and haven't built your "culture" yet, you can align your company by setting clear short-term goals and showing how reaching them will help the business.

One of our portfolio companies is an edtech startup that teaches English to kids. Its long-term goal is to increase conversions from trials to payments. To achieve this, the company has established shorter, more practical goals for each department involved, including teacher operations, marketing, and sales.

The marketing department aimed to increase the conversion rate from ad click to lead, teacher operations focused on enhancing the quality of trial lessons, and sales teams revised their scripts. They had the flexibility to approach their tasks in any way they preferred, allowing them the freedom to be creative.

The key point at this stage is to ensure that managers remember how their teams' roles contribute to the company's primary goal. Otherwise, the business runs the risk of becoming reactive in decision-making (rather than strategic) and overlooking metrics that would move the firm toward its core objective.

It may sound easy — just reminding everyone about the main goal — but it's not. Yes, founders and CEOs know how to set goals, create and measure KPIs, and hold people accountable in the short term. But when the effort takes months or years, tracking often diminishes. Instead, businesses increasingly focus on day-to-day results.

I would suggest two approaches to ensure that a long-term goal remains a constant priority.

1. Set up a quarterly planning process that links your big goal with what

you do each day.

2. Support projects that iterate toward the main goal with transparent communication, where everyone understands their task and whom to ask for help.

Dump unnecessary calls and meetings that don't help prioritise tasks

Most of the video calls are just wasting your time.

People are spending an average of 10 hours per week in virtual meetings and only 30% of them are productive; the rest just annoys employees and distracts them from work.

Ask yourself, “Why do we need this Zoom call?” If it’s just to communicate information, if it has no agenda and can be easily substituted by a Notion note, a Slack message, or a WhatsApp, then there’s no need for it.

Reporting progress is a frequent reason for corporate calls. But it can also be a note in Notion, a card in Trello, or a task in Asana. Just turn a platform you choose into a place where teams and each employee individually can input their goals, objectives, and current results.

If employees update Notion (or any other platform the firm uses) at least once a week, it will suffice to conduct weekly status meetings for short-term goals and hold quarterly sessions to review OKR achievements and establish new ones.

A practice of writing most of the information down instead of having endless Zoom calls will save about 14 hours per month for each employee, nearly two workdays.

Video calls (or even offline meetings) can be used for strategy sessions,

which I recommend to conduct quarterly. During those meetings, team leads share their results in achieving OKRs, discuss key challenges, and offer solutions.

If during a checkpoint you realise that a particular goal is no longer relevant, cross it off and free up time and resources for more important tasks. The outcome of every strategy session should be a written plan for next quarter for each department; short-term goals in this plan should align with long-term vision of a company.

Another useful option to conduct calls is for training your people. It makes sense to develop training and education that makes the vision (or just the current big goal) come alive over time, giving people in the organisation a deeper understanding of what it means and how it could transform their work.

Prioritise urgent tasks based on your long-term goal

No matter how clearly you define your short-term goals, you cannot avoid force majeure. A technical issue, a sudden call with a client, a media inquiry out of the blue — all these things are important even though they weren't planned.

When there are too many ad hoc tasks at the same time, they too should be prioritised.

Priority No. 1. Tasks that directly impact revenue. For instance, your CRM system or banner ad crashes and you can't get customers.

Priority No. 2. Opportunity for additional income. A call with a potential big client or current business partner to work on a new project.

Of course, managers and leaders measure the time consumption of a given task and their teams' current workload when assigning tasks. But when your priorities are clear, focus on a single goal, solve problems swiftly, and aim to use fewer resources to avoid disrupting the entire team.

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