GROWTH
TOOLS™+

SCALING UP COACHES ONE-PAGE TOOLS

CASH

EXECUTION

STRATEGY

PEOPLE

SCALING UP
CERTIFIED COACH

TABLE OF CONTENTS

PEOPLE TOOLS

STRATEGY TOOLS

EXECUTION TOOLS

- ☐ **E1** **Execution:** Who • What • When (WWW)
- ☐ **E2** **Execution:** Rockefeller Habits Checklist™
- ☐ **E3** **Execution**+**:** Company Priorities
- ☐ **E4** **Execution**+**:** Individual Priorities
- ☐ **E5** **Execution**+**:** Develop Period Theme
- ☐ **E6** **Execution**+**:** Review Period Theme
- ☐ **E7** **Execution**+**:** Individual 13-Week Race

CASH TOOLS

- ☐ **C1** **Cash:** Cash Acceleration Strategies (CASh)
- ☐ **C2** **Cash:** The Power of One
- ☐ **C3** **Cash**+**:** Fundability Improvement
- ☐ **C4** **Cash**+**:** Seller Preparation for M&A
- ☐ **C5** **Cash**+**:** Value Improvement from Recurring Revenue

BONUS RESOURCES

- ☐ **B1** **Scaling Up 4D Framework** Getting to Results
- ☐ **B2** **Expectations** Rules of the Road
- ☐ **B3** **Calendar** Year at a Glance
- ☐ **B4** **Recommended** Resources
- ☐ **B8** **Glossary** Terms & Definitions

PEOPLE TOOLS+

Name: _____

Date: _____

		Relationships	Achievements	Rituals	Wealth ($)
Faith	**10–25 Years (Aspirations)**				
Family	**1 Year (Activities)**				
Friends		Start	Start	Start	Start
Fitness	**90 Days (Actions)**				
		Stop	Stop	Stop	Stop
Finance					

1. Name the person accountable for each function.

2. Ask the four questions at the bottom of the page re: whose name(s) you listed for each function.

3. List Key Performance Indicators (KPIs) for each function.

4. Take your Profit and Loss (P/L), Balance Sheet (B/S), and Cash Flow accounting statements and assign a person to each line item, then derive appropriate Results/Outcomes for each function.

Functions	(1) Person Accountable	(3) Leading Indicators (Key Performance Indicators)	(4) Results/Outcomes (P/L or B/S Items)

2. Identify: 1. More than 1 Person in a Seat; 2. Person in more than 1 seat; 3. Empty seats; 4. Enthusiastically Rehire?

1. Identify 4 to 9 processes that drive your business.

2. Assign someone specific accountability for each process.

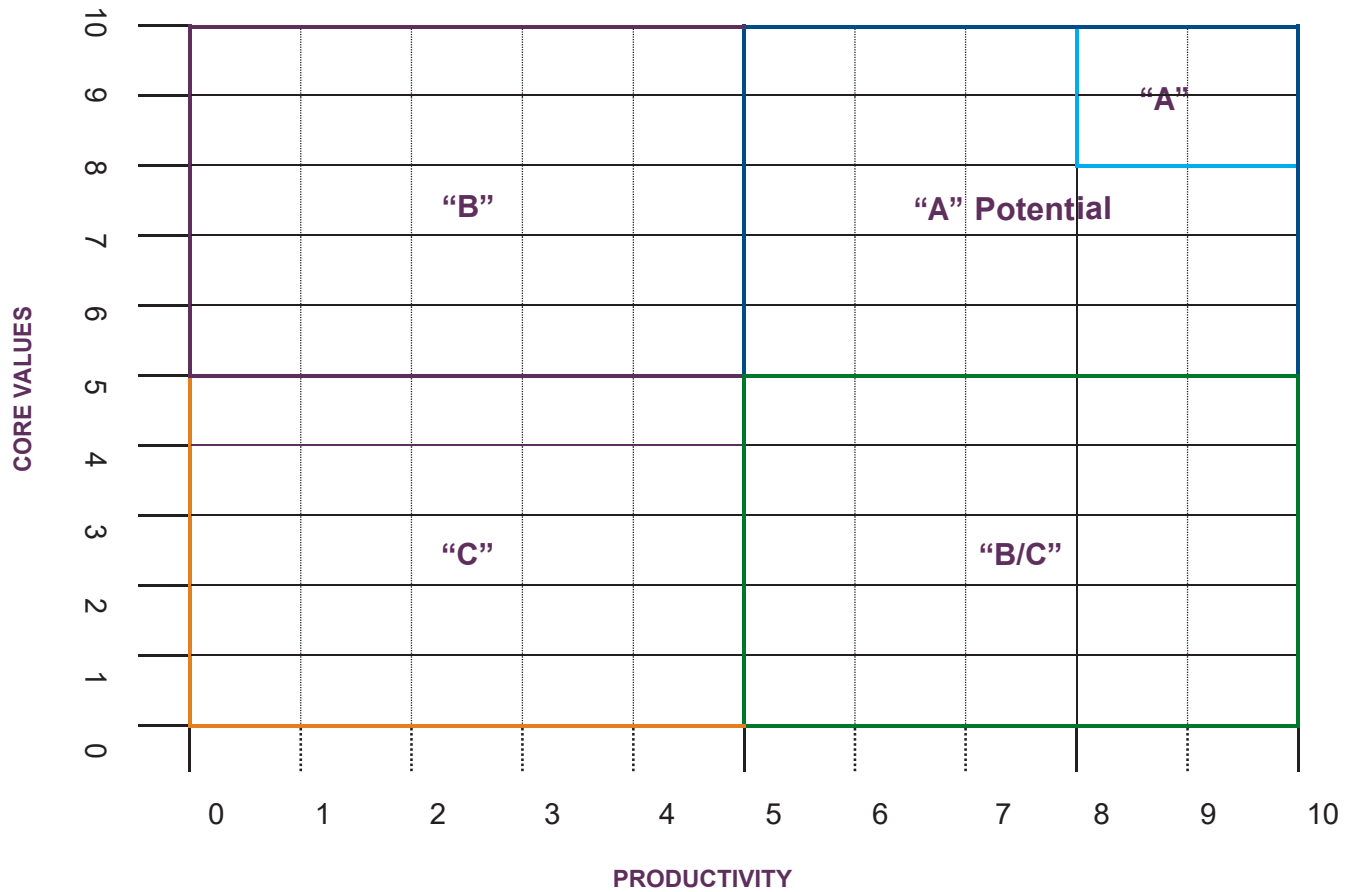3. List Key Performance Indicators (KPIs) for each process (better, faster, cheaper).

2 Person Accountable	1 Name of Process	3 KPIs Better, Faster, Cheaper

Scorecard for Role		☐ Proceed ☐ Reject	
Candidate		**Overall Rating**	
Interviewer		**Interview Date**	

Mission for Role

	Accountabilities & Metrics	Comments	Rating		Competencies	Rating
1						
2						
3						
4						
5						

General Comments

CORE VALUES

"A"

"A" Potential

"B"

"C"

"B/C"

PRODUCTIVITY

Team Member Initials	Productivity Score	Core Value Score	Rating	Action Plan For Next Planning Period

1 Have all team members complete (in writing or mentally) the following questions about themselves.

2 Ask each team member to share their responses to the questions.

3 After all team members have shared, ask the group to discuss what they learned about one another that they didn't already know.

Where did you grow up?

How many siblings do you have and where do you fall in that order?

Please describe a unique or interesting challenge or experience from your childhood.
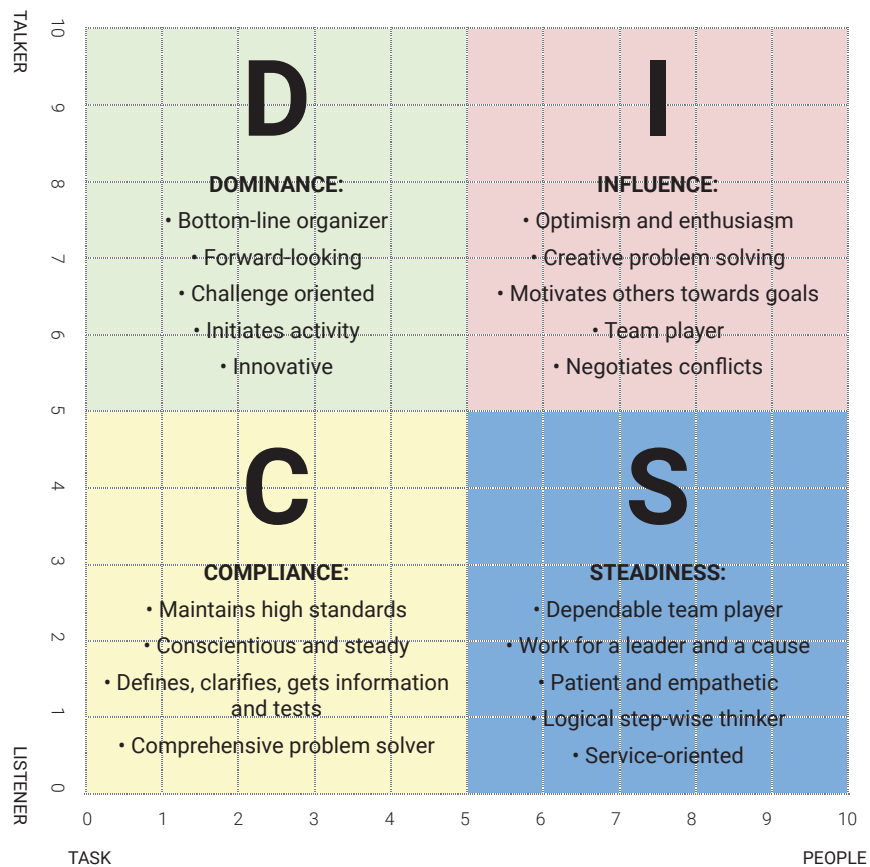
---

1 Answer the two questions below.

2 Place a dot on the graph below where the two numbers intersect.

3 Complete the questions at the bottom of this page to compare your DiSC to that of your coach and peers.

On a scale from 0 to 10, are you a "LISTENER" (0) or a "TALKER" (10)?

0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
LISTENER										TALKER

On a scale from 0 to 10, do you care more about the "TASK" (0) or the "PEOPLE" (10)?

0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
TASK										PEOPLE

TALKER

D

DOMINANCE:
• Bottom-line organizer
• Forward-looking
• Challenge oriented
• Initiates activity
• Innovative

I

INFLUENCE:
• Optimism and enthusiasm
• Creative problem solving
• Motivates others towards goals
• Team player
• Negotiates conflicts

C

COMPLIANCE:
• Maintains high standards
• Conscientious and steady
• Defines, clarifies, gets information and tests
• Comprehensive problem solver

S

STEADINESS:
• Dependable team player
• Work for a leader and a cause
• Patient and empathetic
• Logical step-wise thinker
• Service-oriented

LISTENER

TASK   0 1 2 3 4 5 6 7 8 9 10   PEOPLE

My DiSC Style	DiSC of Coach	DiSC of Person on Left	DiSC of Person on Right

1. Have all team members complete (in writing) the columns for each team member other than themselves.

2. Ask each team member to read what they wrote in the Strength column for the Team Leader. At the end, allow the recipient time to respond with questions or clarifications.

3. Ask each team member to read what they wrote in the Weakness column for the Team Leader. At the end, allow the recipient time to respond with questions or clarifications.

4. Repeat Step 2 and Step 3 to discuss the Strength and Weakness column for each team member.

5. When all team members have received input, have each person share one or two takeaways they will work on individually. Have each team member email those takeaways to the team leader.

Team Member	Strength Single Most Important Behavioral Quality Contributing to the Team	Weakness Single Most Important Behavioral Quality Detracting from the Team

1 Think about the most common weekly tasks that you perform. Use the space below to list each task

2 Circle tasks that are core to your current role and unable to be delegated or improved.

Rank	Tasks I Love (Gives Strength)	Tasks I Loathe (Drains Strength)	Rank
1 Love Most			1 Loathe Most
2			2
3			3
4			4
5 Love Least			5 Loathe Least

3 Collaborate with your team to plan how you could remove the top uncircled "Loathe" task on your list.

I will remove the top "Loathe" on my list by...

4 Add your plan from Step 3 to your Quarterly Personal Priority List.

⑤ Inattention to Results

④ Avoidance of Accountability

③ Lack of Commitment

② Fear of Conflict

① Absence of Trust
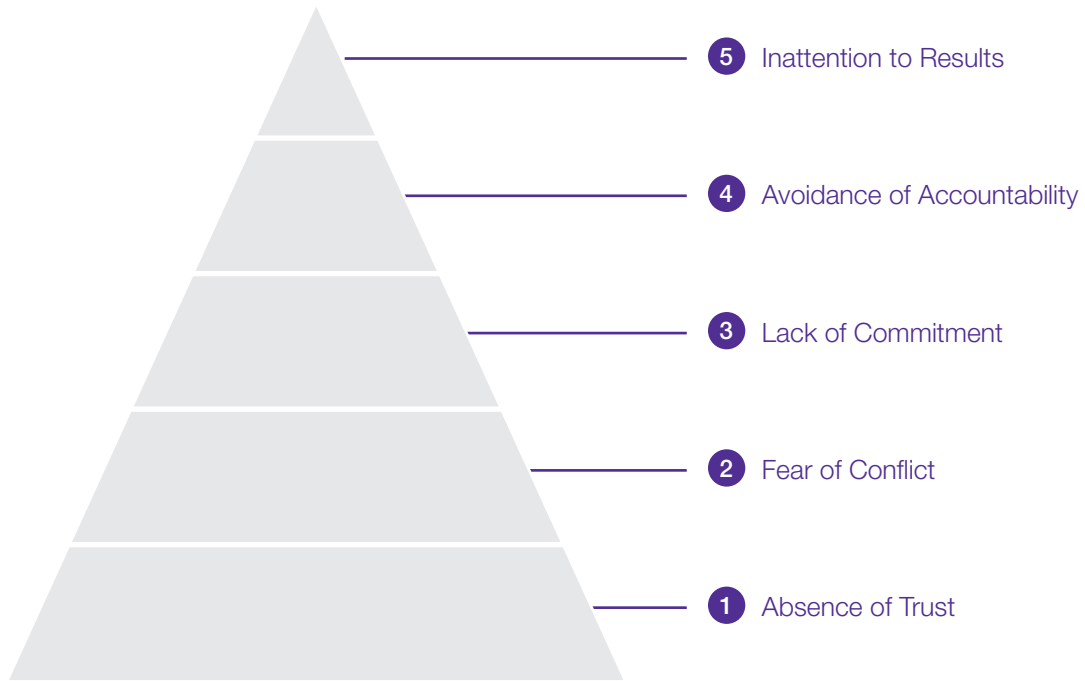
Which Dysfunction is the least challenging for our team? Why do you think this is?

Which Dysfunction is the most challenging for our team? Why do you think this is?

What's one thing we can do as a team next period to improve the team dynamics? Refine and rewrite your idea as a S.M.A.R.T. priority.

STRATEGY TOOLS+

Trends

What are the significant changes in technology, distribution, product innovation, markets, consumer, and social trends around the world that might impact your industry and organization?

Strengths/Core Competencies

What are the inherent strengths of the organization that have been the source of your success?

Weaknesses

What are the inherent weaknesses of the organization that aren't likely to change?

Words You Own (Mindshare):

Sandbox and Brand Promises:

Who/Where (Core Customers)	What (Products and Services)	BRAND PROMISES	KPIs

Brand Promise Guarantee (Catalytic Mechanism):

One-PHRASE Strategy (Key to Making Money):

Differentiating Activities (3–5 Hows):

X-Factor (10x – 100x Underlying Advantage):

Profit per X (Economic Engine):

BHAG* (10 – 25 Year Goal):

*BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

People (Reputation Drivers)

1. _____   1. _____   1. _____
2. _____   2. _____   2. _____
3. _____   3. _____   3. _____

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3–5 YRS.) (Where)	GOALS (1 YR.) (What)
		Sandbox	

Actions *To Live Values, Purposes, BHAG*	Key Thrusts/Capabilities *3-5 Year Priorities*	Key Initiatives *1 Year Priorities*
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5

Profit per X	Brand Promise KPIs	Critical #:
		🟩 🟩 🟨 *Between green & red* 🟥
BHAG®	**Brand Promises**	**Critical #:** 🟩 🟩 🟨 *Between green & red* 🟥

Strengths/Core Competencies

1. _____
2. _____
3. _____

Weaknesses:

1. _____
2. _____
3. _____

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

Process (Productivity Drivers)

1. _____   1. _____   1. _____
2. _____   2. _____   2. _____
3. _____   3. _____   3. _____

ACTIONS (QTR) (How)	THEME (QTR/ANNUAL)	YOUR ACCOUNTABILITY (Who/When)

Rocks

Theme Name

Your KPIs   *Goal*

1		
2		
3		

Quarterly Priorities   *Who*

1		
2		
3		
4		
5		

Scoreboard Design

Describe and/or sketch your design in this space

Your Quarterly Priorities   *Due*

1		
2		
3		
4		
5		

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Celebration

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Reward

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Trends

1. _____   4. _____
2. _____   5. _____
3. _____   6. _____

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

CORE VALUES	PURPOSE	BRAND PROMISES

BHAG

STRATEGIC		PRIORITIES
3–5 yr	**1 yr**	**Qtr**

Your Name: _____

Your KPIs   **Goal**

1		
2		
3		

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Critical #:
- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Your Quarterly Priorities   **Due**

1		
2		
3		
4		
5		

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

Write your organization's Core Purpose below. The Core Purpose is why your organization does what it does.

On a scale from 0 to 10, how is your organization living up to its Core Purpose?

0	1	2	3	4	5	6	7	8	9	10
POOR										OUTSTANDING

Write your organization's BHAG® below. The BHAG® is a clear and compelling 10-25 year audacious goal that acts as a clear catalyst for team direction.

On a scale from 0 to 10, how is your organization moving towards achieving your BHAG®?

0	1	2	3	4	5	6	7	8	9	10
POOR										OUTSTANDING

What's one thing we can do as an organization next period to improve the delivery of Purpose or BHAG®?
Refine and rewrite your idea as a S.M.A.R.T. priority.

*BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

1 Using magazines related to (but not dedicated to) your industry, have all team members cut out at least 6 images that represent your Core Customer's attitudes, lifestyle, values, and drivers.

2 Ask each team member to compile their images into a collage below.

3 Have each team member give their collage a title that describes the Core Customer's essence.

Collage Name	

4 Ask each team member to present their collage and explain why they chose the images and title. Encourage each team member to share if there were any images they were looking for but could not find.

5 Repeat Step 4 to allow each team member to share their collage.

6 When all team members have shared, compile the words and ideas from the group to create a succinct list that summarizes the qualities of your Core Customer.

1 Identify your leading and supporting Brand Promise(s).

What do you promise your customers?

2 Identify 3 to 5 keywords your competitors use to communicate their own Brand Promise(s).

Competitor	Industry	Segment	Niche	Words They Own

3 Compare your company to your competitors.

Your Company	Your Industry	Your Segment	Your Niche

What 3 to 5 keywords does your brand own? What keywords do you want to own?

1 Identify your Core Customer's expectations.

List the qualities that describe your Core Customer.

What does your Core Customer count on?

What does your Core Customer expect?

What does your Core Customer find unique about you?

2 Define your leading and supporting Brand Promise(s).

Brand Promise What is the promise?	KPIs How will you measure it?	Evaluate Is it a strong promise?
		YES NO ☐ ☐ Fit your Core Customer's expectations? ☐ ☐ Differentiate you from competitors? ☐ ☐ Backed up by a Brand Promise Guarantee?
		YES NO ☐ ☐ Fit your Core Customer's expectations? ☐ ☐ Differentiate you from competitors? ☐ ☐ Backed up by a Brand Promise Guarantee?
		YES NO ☐ ☐ Fit your Core Customer's expectations? ☐ ☐ Differentiate you from competitors? ☐ ☐ Backed up by a Brand Promise Guarantee?

1 Evaluate the current state of your business.

What problems do you solve for your customers?	What sets your brand apart from the competition?

What will you sell? (service, product, subscriptions, etc.)	Whom will you sell to? (B2B, wholesale, market segments, etc.)

How will you sell? (manufacturer reps, internal sales team, etc.)	Where will you sell? (local, international, a targeted region, etc.)

2 What do you need to have in place to dominate the above sandbox in the next 3-5 years? Write your ideas below.

EXECUTION TOOLS+

Who	What	When

1. The executive team is healthy and aligned.
- ☐ Team members understand each other's differences, priorities, and styles.
- ☐ The team meets frequently (weekly is best) for strategic thinking.
- ☐ The team participates in ongoing executive education (monthly recommended).
- ☐ The team is able to engage in constructive debates and all members feel comfortable participating.

2. Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move the company forward.
- ☐ The Critical Number is identified to move the company ahead this quarter.
- ☐ 3-5 Priorities (Rocks) that support the Critical Number are identified and ranked for the quarter.
- ☐ A Quarterly Theme and Celebration/Reward are announced to all employees that bring the Critical Number to life.
- ☐ Quarterly Theme/Critical Number posted throughout the company and employees are aware of the progress each week.

3. Communication rhythm is established and information moves through organization accurately and quickly.
- ☐ All employees are in a daily huddle that lasts less than 15 minutes.
- ☐ All teams have a weekly meeting.
- ☐ The executive and middle managers meet for a day of learning, resolving big issues, and DNA transfer each month.
- ☐ Quarterly and annually, the executive and middle managers meet offsite to work on the 4 Decisions.

4. Every facet of the organization has a person assigned with accountability for ensuring goals are met.
- ☐ The Function Accountability Chart (FACe) is completed (right people, doing the right things, right).
- ☐ Financial statements have a person assigned to each line item.
- ☐ Each of the 4-9 processes on the Process Accountability Chart (PACe) has someone that is accountable for them.
- ☐ Each 3-5 year Key Thrust/Capability has a corresponding expert on the Advisory Board if internal expertise doesn't exist.

5. Ongoing employee input is collected to identify obstacles and opportunities.
- ☐ All executives (and middle managers) have a Start/Stop/Keep conversation with at least one employee weekly.
- ☐ The insights from employee conversations are shared at the weekly executive team meeting.
- ☐ Employee input about obstacles and opportunities is being collected weekly.
- ☐ A mid-management team is responsible for the process of closing the loop on all obstacles and opportunities.

6. Reporting and analysis of customer feedback data is as frequent and accurate as financial data.
- ☐ All executives (and middle managers) have a 4Q conversation with at least one end user weekly.
- ☐ The insights from customer conversations are shared at the weekly executive team meeting.
- ☐ All employees are involved in collecting customer data.
- ☐ A mid-management team is responsible for the process of closing the loop on all customer feedback.

7. Core Values and Purpose are "alive" in the organization.
- ☐ Core Values are discovered, Purpose is articulated, and both are known by all employees.
- ☐ All executives and middle managers refer back to the Core Values and Purpose when giving praise or reprimands.
- ☐ HR processes and activities align with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.).
- ☐ Actions are identified and implemented each quarter to strengthen the Core Values and Purpose in the organization.

8. Employees can articulate the following key components of the company's strategy accurately.
- ☐ Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.
- ☐ Core Customer(s) – Their profile in 25 words or less.
- ☐ 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.
- ☐ Elevator Pitch – A compelling response to the question "What does your company do?"

9. All employees can answer quantitatively whether they had a good day or week (Column 7 of the One-Page Strategic Plan).
- ☐ 1 or 2 Key Performance Indicators (KPIs) are reported on weekly for each role/person.
- ☐ Each employee has 1 Critical Number that aligns with the company's Critical Number for the quarter (clear line of sight).
- ☐ Each individual/team has 3-5 Quarterly Priorities/Rocks that align with those of the company.
- ☐ All executives and middle managers have a coach (or peer coach) holding them accountable to behavior changes.

10. The company's plans and performance are visible to everyone.
- ☐ A "situation room" is established for weekly meetings (physical or virtual).
- ☐ Core Values, Purpose and Priorities are posted throughout the company.
- ☐ Scoreboards are up everywhere displaying current progress on KPIs and Critical Numbers.
- ☐ There is a system in place for tracking and managing the cascading Priorities and KPIs.

Company Priority #1	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

Company Priority #2	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

Company Priority #3	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

Company Priority #4	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

Company Priority #5	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

What's one specific thing we can do as an organization to improve next period based on last period's Priorities?
Refine and rewrite your idea as a S.M.A.R.T. priority.

Individual Priority #1	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

If applicable, what are your next steps to complete Individual Priority #1? Enter the Action Item on your WWW Worksheet.

Individual Priority #2	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

If applicable, what are your next steps to complete Individual Priority #2? Enter the Action Item on your WWW Worksheet.

Individual Priority #3	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

If applicable, what are your next steps to complete Individual Priority #3? Enter the Action Item on your WWW Worksheet.

Individual Priority #4	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

If applicable, what are your next steps to complete Individual Priority #4? Enter the Action Item on your WWW Worksheet.

Individual Priority #5	Owner	Status
		☐ Will happen ☐ At risk/need help ☐ Will not happen

If applicable, what are your next steps to complete Individual Priority #5? Enter the Action Item on your WWW Worksheet.

Review the Priorities for the upcoming Period. Think about what outcome would be considered a success at the end of the Period. Brainstorm 5+ Themes that would drive one or more of the top Priorities to success.

Evaluate Theme ideas.	Define success for the Period.
YES **NO**	
☐ ☐ Is the Theme clearly connected to the Priority?	
☐ ☐ Does the Theme have context in all employees' minds?	
☐ ☐ Can everyone participate in the Theme?	
☐ ☐ Is the Theme memorable, fun, and/or inspiring?	
☐ ☐ Does the Theme have an emotional connection?	
☐ ☐ Will the Theme and its actions drive success?	

Theme Leader (Team Name) Team who will review last period's Theme and develop this Theme.	**Period** (Roll-out Date)

Theme Description Define the organization-wide mission.	**Theme Visual** Illustrate the theme.

Define Theme Reward How will we celebrate the successful execution of the Theme?

Review the Theme from the last Period. Identify and describe the Theme.

How was the Theme measured? Identify and describe the indicators of success.

How well did the Theme create focus and energy towards the outcome? Rate on a scale from 1-10.

0	1	2	3	4	5	6	7	8	9	10
POOR										OUTSTANDING

Explain your answer. Describe how the Theme did or did not create focus and energy toward the outcome.

Think about the next Period. How can the Theme be improved moving forward?

Your Name: _____

Your KPIs | Goal

1		
2		
3		

Critical #:

- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Critical #:

- 🟩
- 🟩
- 🟨 *Between green & red*
- 🟥

Your Quarterly Priorities | Due

1		
2		
3		
4		
5		

Week	The observable result I will deliver by end of week is...	Happened	Didn't Happen
1		☐	☐
2		☐	☐
3		☐	☐
4		☐	☐
5		☐	☐
6		☐	☐
7		☐	☐
8		☐	☐
9		☐	☐
10		☐	☐
11		☐	☐
12		☐	☐
13		☐	☐

CASH TOOLS+

Cash Conversion Cycle (CCC)

A Sales Cycle

C Delivery Cycle

D Billing & Payment Cycle

B Make/Production & Inventory Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
A Ways to improve your Sales Cycle			
1			
2			
3			
4			
5			
B Ways to improve your Make/Production & Inventory Cycle			
1			
2			
3			
4			
5			
C Ways to improve your Delivery Cycle			
1			
2			
3			
4			
5			
D Ways to improve your Billing & Payment Cycle			
1			
2			
3			
4			
5			

SCALING UP
A GAZELLES COMPANY

Your Power of One	Net Cash Flow $	EBIT $
Your Current Position		

Your Power of One	Change You Would Like to Make	Annual Impact on Cash Flow $	Impact on EBIT $
Price Increase %	%		
Volume Increase %	%		
COGS Reduction %	%		
Overheads Reduction %	%		
Reduction in Debtors Days	day(s)		
Reduction in Stock Days	day(s)		
Increase in Creditors Days	day(s)		
Your Power of One Impact			

Your Power of One	Net Cash Flow $	EBIT $
Your **Adjusted** Position		

1 Individually evaluate the organization based on the following criteria:

	Weak	Solid	Great
Leadership Team based on: ☐ Track record ☐ Relevant experience ☐ Continuous learning			
Business Model based on: ☐ Recurring revenue ☐ Competitive advantage ☐ Going market and customer base			
Values & Execution Habits based on: ☐ Purpose, Vision, & Values ☐ One-Page Strategic Plan ☐ Rockefeller Habits usage			
Industry Experience based on: ☐ Competitive experience ☐ Industry leadership			
Exit Plan based on: ☐ Potential acquirers ☐ Valuation multiples researched			
House in Order based on: ☐ Capitalization table documented ☐ Good record-keeping ☐ Orderly financial statements			
Consistency based on: ☐ Predictable and consistent results ☐ Revenue and profit growth each quarter			
Protected Assets based on: ☐ Patents, trademarks, and copyrights ☐ Thought leadership ☐ Unique products or services			

2 Compare your evaluation with the team or a partner.

3 Brainstorm 6+ ways to improve fundability over the next period with the team or a partner.

4 Refine your top 1-3 ideas and write them below.

	Improve	Build	Owner	Deadline
	☐	☐		
	☐	☐		
	☐	☐		

1 Individually evaluate your organization based on the following criteria:

	None	Weak	Solid	Great
Long-Term Contracts	☐	☐	☐	☐
Auto-Renewal Subscription	☐	☐	☐	☐
Capital Investment Subscription	☐	☐	☐	☐
Subscriptions	☐	☐	☐	☐
Capital Investment Consumables	☐	☐	☐	☐
Consumables	☐	☐	☐	☐

2 Compare your evaluation with the team or a partner.

3 Brainstorm 6+ ways to improve recurring revenue over the next period with the team or a partner.

4 Rewrite up to 3 of the best ideas below.

	Improve	Build	Owner	Deadline
	☐	☐		
	☐	☐		
	☐	☐		

BONUS RESOURCES

Scaling Up 4D Framework Getting to Results

A proven business growth method used by thousands of growing companies to achieve **_RESULTS_**.

1 Driver (with Accelerators)

Coaching – Advisors, Consultants, Coaches
Learning – Continuous Business Education (CBE)
Technology – Management Accountability System

2 Demands (Balance)

People (Reputation) – Employees, Customers, Shareholders
Process (Productivity) – Make/Buy, Sell, Recordkeeping

3 Disciplines (Routines)

Priorities – The Main Thing
Data – Qualitative/Quantitative
Meeting Rhythms – Daily, Weekly, Monthly, Quarterly, Annual

4 Decisions (Right Questions)

People – Happiness/Accountability
Strategy – Revenue/Growth
Execution – Profit/Time
Cash – Oxygen/Options

! Results

2x Cash Flow • 3x Profitability • 10x Valuation • More Time!

Expectations Rules of the Road

2

Understand and identify
the objectives the organization
could pursue.

3

Develop a plan to achieve
the objectives the organization
will pursue.

1

Reflect on the organization's
current performance.

4

Focus on the plan,
adapting as necessary.
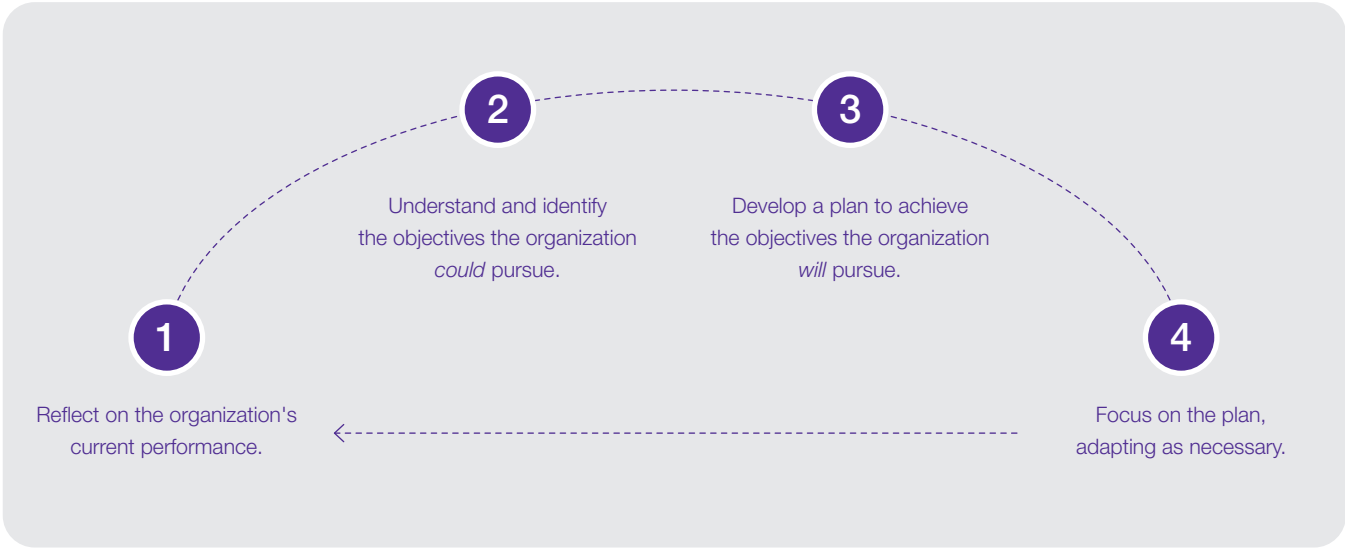
Outcomes Today

- ☐ Review progress on priorities and metrics
- ☐ Review upcoming priorities
- ☐ Prepare our team for the priorities of the current period
- ☐ Review and update the One-Page Strategic Plan
- ☐ Create top 3-5 important priorties for the organization
- ☐ Create the top 3-5 important priorities with KPIs for each individual
- ☐ Create a Theme for the next period
- ☐ Create the execution plan for the upcoming period
- ☐ Ultimate outcome: 'Align' the team with the important things to accomplish
- ☐
- ☐
- ☐
- ☐

Meeting Rules

Prepare for each session	Focus on the meeting objectives
Trust the process	Embrace healthy conflict
Think before speaking	

CALENDAR YEAR AT A GLANCE

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

Sun	Mon	Tue	Wed	Thu	Fri	Sat

PEOPLE RESOURCES

☐ *The 21 Irrefutable Laws of Leadership* / John C. Maxwell

☐ *The 5 Levels of Leadership: Proven Steps to Maximize Your Potential* / John C. Maxwell

☐ *The Coaching Habit: Say Less, Ask More & Change the Way* / Michael Bungay Stanier

☐ *Crucial Conversations* / Kerry Patterson, Al Switzler, Joseph Grenny, & Ron McMillan

☐ *The Culture Code: The Secrets of Highly Successful Groups* / Daniel Coyle

☐ *Delivering Happiness* / Tony Hsieh

☐ *Drive: The Surprising Truth About What Motivates Us* / Daniel H. Pink

☐ *Fierce Conversations* / Susan Scott

☐ *First, Break All the Rules* / Marcus Buckingham & Curt Coffman

☐ *The Five Dysfunctions of a Team: A Leadership Fable* / Patrick M. Lencioni

☐ *Go Put Your Strengths to Work* / Marcus Buckingham

☐ *The Ideal Team Player* / Patrick M. Lencioni

☐ *Leadership Challenge* / James Kouzes & Barry Posner

☐ *Multipliers* / Liz Wiseman

☐ *Now, Discover Your Strengths* / Marcus Buckingham & Donald O. Clifton

☐ *Our Iceberg Is Melting* / John Kotter & Holger Rathgeber

☐ *Oz Principles* / Roger Connor, Tom Smith, & Craig Hickman

☐ *The Power of Full Engagement* / Jim Loehr & Tony Schwartz

☐ *Powerful: Building a Culture of Freedom and Responsibility* / Patty McCord

☐ *Radical Candor* / Kim Scott

☐ *Strengths-Based Leadership* / Tom Rath & Barry Conchie

☐ *Topgrading* / Bradford D. Smart

☐ *Turn Your Ship Around* / David Marquet

☐ *What Got You Here Won't Get You There* / Marshall Goldsmith & Mark Reiter

☐ *Who: The A Method for Hiring* / Geoff Smart & Randy Street

☐ *The Work of Leaders* / Julie Straw, Mark Scullard, Susie Kukkonen, & Barry Davis

STRATEGY RESOURCES

- ☐ *Abundance* / Peter Diamonds & Steven Kotler
- ☐ *The Advantage* / Patrick M. Lencioni
- ☐ *Blue Ocean Strategy* / W. Chan Kim & Renée Mauborgne
- ☐ *Blueprint to a Billion* / David G. Thomson
- ☐ *The Brand Promise* / Duane Knapp
- ☐ *Built to Last* / Jim Collins & Jerry I. Porras
- ☐ *Business Model Canvas* / Alex Osterwalder & Yves Pigneur
- ☐ *Catalytic Mechanism* / hbr.org/1999/07/turning-goals-into-results-the-power-of-catalytic-mechanisms
- ☐ *Competitive Advantage* / Michael E. Porter
- ☐ *Exponential Organizations* / Salim Ismail, Michael S. Malone, & Yuri Van Geest
- ☐ *Good to Great* / Jim Collins
- ☐ *Good to Great to Gone* / Alan Wurtzel
- ☐ *Great by Choice* / Jim Collins & Morten T. Hansen
- ☐ *Hidden Champion of the 20th Century* / Hermann Simon
- ☐ *How Companies Win* / Rick Kash & David Calhoun
- ☐ *How the Mighty Fall* / Jim Collins
- ☐ *The Inside Advantage* / Robert Bloom & Dave Conti
- ☐ *The Lords of Strategy* / Walter Kiechel
- ☐ *Outthink the Competition* / Kaihan Krippendorf
- ☐ *The Sales Playbook* / Jack Daly & Dan Larson
- ☐ *Start with Why* / Simon Sinek
- ☐ *Turning the Flywheel* / Jim Collins
- ☐ *The Ultimate Question* / Frederick F. Reichheld & Rob Markey
- ☐ *Uncommon Service* / Frances Frei & Anne Morriss
- ☐ *The Value Proposition* / Alexander Osterwalder, Yves Pigneur, & Gregory Bernarda
- ☐ *X-Factor* / hbr.org/2015/07/break-your-industrys-bottlenecks

EXECUTION RESOURCES

☐ *The 4 Disciplines of Execution* / Chris McChesney, Sean Covey, & Jim Huling

☐ *The 4 Hour Workweek* / Tim Ferriss

☐ *Balanced Scorecard* / Robert S. Kaplan & David P. Norton

☐ *Death by Meeting* / Patrick M. Lencioni

☐ *Execution Without the Drama* / Patrick Thean

☐ *Getting Things Done* / David Allen

☐ *The Goal* / Eliyahu M. Goldratt & Jeff Cox

☐ *Key Performance Indicators* / David Parmenter

☐ *Seven Habits of Highly Effective People* / Stephen Covey

☐ *Switch: How to Change Things When Change Is Hard* / Chip Heath & Dan Heath

CASH RESOURCES

☐ *The Automatic Customer* / John Warrilow

☐ *Built to Sell* / John Warrilow

☐ *Cash Flow Story* / cashflowstory.com

☐ *Confessions of a Pricing Man* / Hermann Simon

☐ *Financial Intelligence* / Karen Berman, Joe Knight & John Case

☐ *Great Game of Business* / Jack Stack & Bo Burlingham

☐ *Keys to the Vault* / Keith J. Cunningham

☐ *Profit First* / Mike Michalowicz

☐ *Simple Numbers, Straight Talk, Big Profits!* / Greg Crabtree & Beverly Harzog

☐ *A Stake in the Outcome* / Jack Stack & Bo Burlingham

☐ *Ultimate Blueprint* / Keith J. Cunningham

BONUS RESOURCES

- ☐ *Art of War* / Sun Tzu
- ☐ *Business Model Canvas* / strategyzer.com/canvas/business-model-canvas
- ☐ *CliftonStrengths (StrengthsFinder)* / gallupstrengthscenter.com
- ☐ *Driven* / David Kiley
- ☐ *HBR's 10 Must Reads on Strategy* / Harvard Business Review
- ☐ *The Ikea Edge* / Anders Dahlvig
- ☐ *The New Gold Standard* / Joseph Michelli
- ☐ *Nuts!* / Jackie Freiberg & Kevin Freiberg
- ☐ *Onward* / Howard Schultz
- ☐ *Steve Jobs* / Walter Isaacson
- ☐ *Titan* / Ron Chernow
- ☐ *Tools of Titans & Tribe of Mentors* / Tim Ferriss
- ☐ *The Virgin Way* / Richard Branson
- ☐ *Winning* / Jack Welch & Suzy Welch
- ☐ *Wooden on Leadership* / John Wooden & Steve Jamison
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....
- ☐ ....

GLOSSARY TERMS & DEFINITIONS

Accountability belongs to the one person who is "able to count" progress and give voice when issues arise within a defined task, team, function, or division. This is not the same as authority or responsibility.

Almost Matrix, The is the organizational structure aligning teams around cross-functional projects. In The Almost Matrix, the functional heads become coaches/advisors to business unit leaders while business unit leads operate like individual CEOs.

BHAG®, or Big Hairy Audacious Goal, is the goal for 10- to 25-years out that provides constant context for all of the decisions made throughout the organization. BHAG® is a registered trademark of Jim Collins and Jerry Porras.

Bottleneck is a person or situation that delays a process or system.

Brand Promise is a specific guarantee that would compel potential customers to choose a brand over the competition. This Brand Promise is supported by a Brand Promise Guarantee.

Brand Promise Guarantee is a public promise of reparation if a Brand Promise is broken. The reparation may include a refund, cash payments, or a pay-what-you'd-like "short pay" option.

Coach is a mentor that empowers the people within an organization to find their own solutions to business issues. Coaches are often generalists that share knowledge, encourage mindset shifts, and conduct critical thinking exercises to enable the organization. A coach is not the same as a consultant.

Consultant is a professional, usually specialized in a particular field (Marketing, IT, Management, etc.), focused on the strategic resolution of specific business issues. A consultant is not the same as a coach.

Core Competencies are the organizational proficiencies that: (1) are not easy for competitors to imitate; (2) can be reused widely for many products and markets; and (3) contribute to the benefits of the end customer experience and the value of the product or service to customers.

Core Purpose is the word, phrase, or speech that keep everyone's head engaged in the strategic direction of the business.

Core Values are the handful of rules defining the culture which are reinforced through people (HR) systems on a daily basis.

Critical Number is a priority that addresses an opportunity or challenge on the People/Balance Sheet side of the business or the Process/Profit & Loss side of the business.

Daily Huddle is a 5- to 15-minute meeting to discuss: (1) what's up in the next 24 hours; (2) daily metrics of the organization; and (3) Stucks/Constraints. This is a component of Rockefeller Habit #3: Meeting Rhythm.

Differentiating Activities are the unique ways you deliver your Brand Promise.

Direct Support is the title that better describes the role of individuals often known as "direct reports."

FACe, or Functional Accountability Chart, is a Growth Tool in the PEOPLE section of the Scaling Up Methodology™ that clarifies the people who are accountable for scaling the business.

Key Thrusts/Capabilities are the medium-term 3-5 year priorities for the organization.

KPI, or Key Performance Indicator, is an important metric that measures the progress of a strategic objective. Indicators may measure results (lagging indicator) or data that may lead to a result (leading indicator).

Metric is a measure of a business process's status. Metrics provide data which may or may not be important.

Objective is a strategic goal or target.

One-PHRASE Strategy is the key lever in your business model that drives profitability and helps you choose which customer desires to meet and which ones to ignore. We strongly suggest the company keep it a strategic secret, at least in the early years.

OPPP, or One-Page Personal Plan, is a Growth Tool in the PEOPLE section of the Scaling Up Methodology™ that provides a framework for people to plan their personal life. This can be an effective tool for employee coaching and mentorship.

OPSP, or One-Page Strategic Plan, is a Growth Tool in the STRATEGY section of the Scaling Up Methodology™ that drives alignment, accountability, and focus by summarizing the information from all other Growth Tools.

Organizational Chart is a visual representation of the roles, titles, and people in an organization. It is subject to frequent changes.

Organizational Structure is the grouping of business functions. This structure may include Product, Sales, Finance, etc., and changes infrequently.

PACe, or Process Accountability Chart, is a Growth Tool in the PEOPLE section of the Scaling Up Methodology™ that lists the processes and people accountable for keeping the business running smoothly.

Priority is an important goal that is expected to be achieved over the planning period. It is measured and tracked by either a percentage completion or a KPI.

Profit per X, or Economic Engine, is a KPI that can be provided to the leaders of the business to track the primary source of profit. The "X" is an important element to be monitored and optimized. The "X" in Profit per X is not related to the "X" in X-Factor.

Responsibility is what falls to anyone "able to respond" proactively to support the team. It includes all the people who touch a particular process or issue. This is not the same as accountability or authority.

Stucks/Constraints are the concerns or problems that would prevent a team member from having a great next 24 hours. This is a crucial component of a Daily Huddle.

Talent Assessment Chart is a Topgrading tool in the PEOPLE section of the Scaling Up Methodology™ that supports the identification of A Players through a two-axis scale.

Task is an action that has a specific due date within a period. A task is either done or not done.

Verne Harnish author of *Scaling Up: How a Few Companies Make It...and Why the Rest Don't (Rockefeller Habits 2.0)* which forms the basis of the Scaling Up Methodology™.

X-Factor, or the 10x-100x Underlying Advantage, is the edge that underpins strategic activities and blocks competitors from trying to imitate your organization. It typically addresses a huge, established choke point in an industry. The "X" in X-Factor is not related to the "X" in Profit per X.

NOTES

NOTES

NOTES

NOTES