

**GROWTH**TOOLStm

One-Page Tools for Scaling-Up the Business

**People:** One-Page Personal Plan (OPPP) **People:** Function Accountability Chart (FACe) **People:** Process Accountability Chart (PACe)

**Strategy:** Strengths, Weaknesses, Trends (SWT)

**Strategy:** 7 Strata

**Strategy:** One-Page Strategic Plan (OPSP)

**Strategy:** Vision Summary

**Execution:** Who, What, When (WWW)

**Execution:** Rockefeller Habits Checklisttm

A picture containing text, clipart

Description automatically generated**Cash:** Cash Acceleration Strategies (CAsh)

**Cash:** The Power of One



**Gazelles 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

1. **Demands** (Balance)

**People (Reputation)** – Employees, Customers, Shareholders

**Process (Productivity)** – Make/Buy, Sell, Record Keeping

1. **Disciplines** (Routines)

**Priorities** – The Main Thing

**Data** – Qualitative/Quantitative

**Meeting Rhythms** – Daily, Weekly, Monthly, Quarterly, Annual

1. **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!**

**People:** One-Page Personal Plan (OPPP)



Name Date

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | | **Relationships** | **Achievements** | **Rituals** | **Wealth ($)** |
| **FInAnCE FITnESS FRIEnDS FAMILY FAITH** | **10-25 Years** (Aspirations) |  |  |  |  |
| **1 Year** (Activities) |  |  |  |  |
| **90 Days** (Actions) | **Start** | **Start** | **Start** | **Start** |
|  |  |  |  |
| **Stop** | **Stop** | **Stop** | **Stop** |
|  |  |  |  |

**People:** Function Accountability Chart (FACe)



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, and Cash Flow accounting statements and assign a person to each line item, then derive appropriate Results/Outcomes for each function.

**1 3 4**

|  |  |  |  |
| --- | --- | --- | --- |
| **Functions** | **Person Accountable** | **Leading Indicators**  (Key Performance Indicators) | **Results/Outcomes**  (P/L or B/S Items) |
| Head of Company |  |  |  |
| Marketing |  |  |  |
| R&D/Innovation |  |  |  |
| Sales |  |  |  |
| Operations |  |  |  |
| Treasury |  |  |  |
| Controller |  |  |  |
| Information Technology |  |  |  |
| Human Resources |  |  |  |
| Talent Development/Learning |  |  |  |
| Customer Advocacy |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Heads of Business Units |  |  |  |
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**2 Identify: 1.** More than 1 person in a seat; **2.** Person in more than 1 seat; **3.** Empty seats; **4.** Enthusiastically rehire?

# **People:** Process Accountability Chart (PACe)



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 1 3**

|  |  |  |
| --- | --- | --- |
| **Person Accountable** | **name of Process** | **KPIs** (Better, Faster, Cheaper) |
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**Strategy:** Strengths, Weaknesses, Trends (SWT)

**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 Weaknesses**

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



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

**Strategy:** 7 Strata



Organization Name:

**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 How’s)**

**X-Factor (10x-100x Underlying Advantage)**

**Profit per X (Economic Engine)**

**BHAG® (10-25 Year Goal)**

**Strategy:** One-Page Strategic Plan (OPSP)

Organization Name:

|  |  |  |
| --- | --- | --- |
| **People** (Reputation Drivers)  **Employees** | **Customers** | **Shareholders** |
| 1. | 1. | 1. |
| 2. | 2. | 2. |
| 3. | 3. | 3. |

## CORE VALUES/BELIEFS

(Should/Shouldn’t)

**PURPOSE**

(Why)

**Actions**

To Live Values, Purposes, BHAG®

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

**Profit per X**

**BHAG®**

## TARGETS (3-5 YRS.)

(Where)

|  |  |
| --- | --- |
| Future Date |  |
| Revenues |  |
| Profit |  |
| Mkt. Cap./Cash |  |

**Sandbox**

**Key Thrusts/Capabilities**

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

**Brand Promise KPIs**

**Brand Promises**

## GOALS (1 YR.)

(What)

|  |  |
| --- | --- |
| Yr. Ending |  |
| Revenues |  |
| Profit |  |
| Mkt. Cap. |  |
| Gross Margin |  |
| Cash |  |
| A/R Days |  |
| Inv. Days |  |
| Rev./Emp. |  |

**Key Initiatives**

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |
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| 4 |  |
| 5 |  |

**Critical #: People or B/S**

*Between green and red*

**Critical #: Process or P/L**

*Between green and red*

## Strengths/Core Competencies Weaknesses

1.



2.

3.

1.

2.

3.

Your Name: Date:

|  |  |  |
| --- | --- | --- |
| **Process** (Productivity Drivers)  **Make/Buy** | **Sell** | **Record Keeping** |
| 1. | 1. | 1. |
| 2. | 2. | 2. |
| 3. | 3. | 3. |

|  |  |  |
| --- | --- | --- |
| **ACTIOnS (QTR)**  (How) | **THEME**  (Qtr./Annual) | **YOUR ACCOUnTABILITY**  (Who/When) |
| **Rocks**  Who | Deadline  Measurable Target/Critical #  **Theme name**  **Scoreboard Design** Describe and/or sketch your design in this space | Your KPIs Goal  Your Quarterly Priorities Due |
| **Critical #: People or B/S**      *Between green and red* | **Celebration** | **Critical #: People or B/S**      *Between green and red* |
| **Critical #: Process or P/L**      *Between green and red* | **Reward** | **Critical #: Process or P/L**      *Between green and red* |

## Trends



|  |  |
| --- | --- |
| Qtr. # |  |
| Revenues |  |
| Profit |  |
| Mkt. Cap. |  |
| Gross Margin |  |
| Cash |  |
| A/R Days |  |
| Inv. Days |  |
| Rev./Emp. |  |

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1.

2.

3.

4.

5.

6.

**Strategy:** Vision Summary

**Core Values**

**Purpose**

**Brand Promises**

**BHAG®**

**STRATEGIC PRIORITIES**

3-5 Years

1 Year

Quarter

Your KPIs Goal

|  |  |  |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

YOUR NAME

Your Quarterly Priorities Due

**Critical #: Process or P/L**

*Between green and red*

**Critical #: People or B/S**

|  |  |  |
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| 1 |  |  |
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*Between green and red*

**Execution:** Who, What, When (WWW)



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| --- | --- | --- |
| **Who** | **What** | **When** |
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**Execution:** Rockefeller Habits Checklisttm



### The executive team is healthy and aligned.

l Team members understand each other‘s differences, priorities, and styles.

l The team meets frequently (weekly is best) for strategic thinking.

l The team participates in ongoing executive education (monthly recommended).

l The team is able to engage in constructive debates and all members feel comfortable participating.

### Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move the company forward.

l The Critical Number is identified to move the company ahead this quarter.

l 3-5 Priorities (Rocks) that support the Critical Number are identified and ranked for the quarter.

l A Quarterly Theme and Celebration/Reward are announced to all employees that bring the Critical Number to life.

l Quarterly Theme/Critical Number posted throughout the company and employees are aware of the progress each week.

### Communication rhythm is established and information moves through organization accurately and quickly.

l All employees are in a daily huddle that lasts less than 15 minutes.

l All teams have a weekly meeting.

l The executive and middle managers meet for a day of learning, resolving big issues, and DNA transfer each month.

l Quarterly and annually, the executive and middle managers meet offsite to work on the 4 Decisions.

### Every facet of the organization has a person assigned with accountability for ensuring goals are met.

l The Function Accountability Chart (FACe) is completed (right people, doing the right things, right).

l Financial statements have a person assigned to each line item.

l Each of the 4-9 processes on the Process Accountability Chart (PACe) has someone that is accountable for them.

l Each 3-5 year Key Thrust/Capability has a corresponding expert on the Advisory Board if internal expertise doesn’t exist.

### Ongoing employee input is collected to identify obstacles and opportunities.

l All executives (and middle managers) have a Start/Stop/Keep conversation with at least one employee weekly.

l The insights from employee conversations are shared at the weekly executive team meeting.

l Employee input about obstacles and opportunities is being collected weekly.

l A mid-management team is accountable for the process of closing the loop on all obstacles and opportunities.

### Reporting and analysis of customer feedback data is as frequent and accurate as financial data.

l All executives (and middle managers) have a 4Q conversation with at least one end user weekly.

l The insights from customer conversations are shared at the weekly executive team meeting.

l All employees are involved in collecting customer data.

l A mid-management team is accountable for the process of closing the loop on all customer feedback.

### Core Values and Purpose are “alive” in the organization.

l Core Values are discovered, Purpose is articulated, and both are known by all employees.

l All executives and middle managers refer back to the Core Values and Purpose when giving praise or reprimands. l HR processes and activities align with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.). l Actions are identified and implemented each quarter to strengthen the Core Values and Purpose in the organization.

### Employees can articulate the following key components of the company’s strategy accurately.

l Big Hairy Audacious Goal (BHAG®) — progress is tracked and visible.

l Core Customer(s) — their profile in 25 words or less.

l 3 Brand Promises — and the corresponding Brand Promise KPIs reported on weekly.

l Elevator Pitch — a compelling response to the question “What does your company do?”

### All employees can answer quantitatively whether they had a good day or week (column 7 of the One-Page Strategic Plan).

l 1 or 2 Key Performance Indicators (KPIs) are reported on weekly for each role/person.

l Each employee has 1 Critical Number that aligns with the company’s Critical Number for the quarter (clear line of sight).

l Each individual/team has 3-5 Quarterly Priorities/Rocks that align with those of the company.

l All executives and middle managers have a coach (or peer coach) holding them accountable to behavior changes.

### The company’s plans and performance are visible to everyone.

l A “situation room” is established for weekly meetings (physical or virtual).

l Core Values, Purpose and Priorities are posted throughout the company.

l Scoreboards are up everywhere displaying current progress on KPIs and Critical Numbers.

l There is a system in place for tracking and managing the cascading Priorities and KPIs.

# **Cash:** Cash Acceleration Strategies (CASh)

## Cash Conversion Cycle (CCC)

**A**

Sales Cycle

**B**

|  |  |  |  |
| --- | --- | --- | --- |
| Make/Production & Inventory Cycle | Shorten Cycle Times | Eliminate Mistakes | Improve Business Model  & P/L |
| **Ways to improve your Sales Cycle** | | | |
| **1** |  |  |  |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |
| **5** |  |  |  |

**C**

Delivery Cycle

**D**

Billing & Payment Cycle



**A**

**B**

|  |  |  |  |
| --- | --- | --- | --- |
| **Ways to improve your Make/Production & Inventory Cycle** | | | |
| **1** |  |  |  |
| **2** |  |  |  |
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| **4** |  |  |  |
| **5** |  |  |  |

**C**

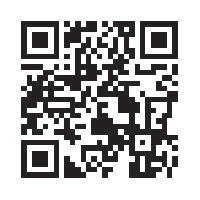
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| **Ways to improve your Delivery Cycle** | | | |
| **1** |  |  |  |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |
| **5** |  |  |  |

**D**

|  |  |  |  |
| --- | --- | --- | --- |
| **Ways to improve your Billing & Payment Cycle** | | | |
| **1** |  |  |  |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |
| **5** |  |  |  |

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| **Cash:** The Power of One | | |
| **Your Power of One** | **net Cash Flow $** | **EBIT $** |
| Your Current Position |  |  |
| **Your Power of One Change you would** | **Annual Impact on** | **Impact on** |
| **like to make** | **Cash Flow $** | **EBIT $** |
| Price Increase % % |  |  |
| Volume Increase % % |  |  |
| COGS Reduction % % |  |  |
| Overheads Reduction % % |  |  |
| Reduction in Debtors Days days |  |  |
| Reduction in Stock Days days |  |  |
| Increase in Creditors Days days |  |  |
| **Your Power of One Impact** |  |  |
| **Your Power of One** | **net Cash Flow $** | **EBIT $** |
| Your **Adjusted** Position |  |  |

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|  |
| Notes: |



If we can assist you with implementation of the Rockefeller Habitstm, Annual Planning, or to build a One-Page Strategic Plan for your business, please contact us at [**coaches@GICoaches.com**](mailto:coaches@GICoaches.com)