GROWTHTOOLS™

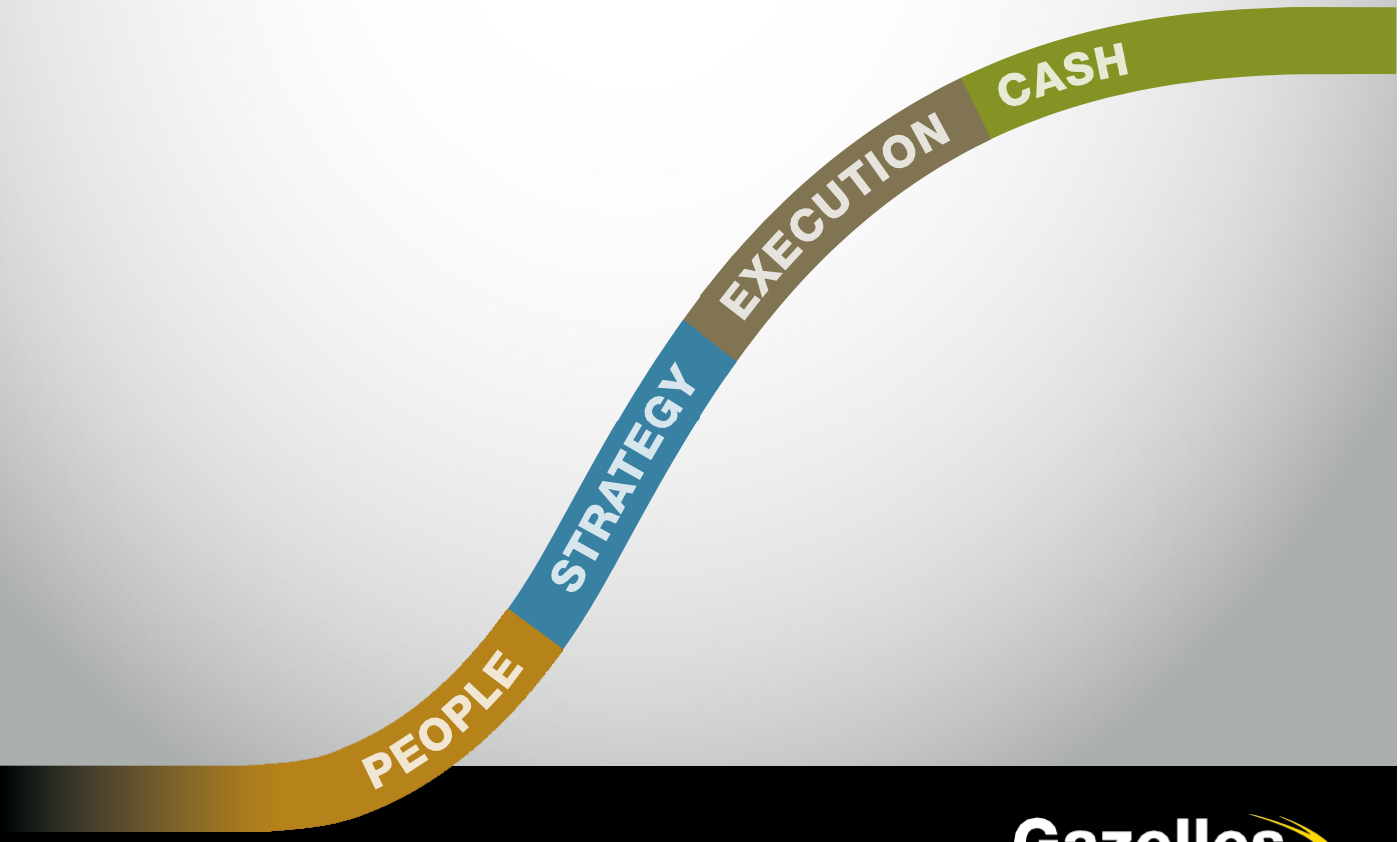
One-Page Tools for Scaling-Up the Business

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 Checklist™

Cash: Cash Acceleration Strategies (CAsh)



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GROWING LEADERS - GROWING COMPANIES

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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

2 Demands (Balance)

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

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!

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People: One-Page Personal Plan (OPPP)

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Name _____ Date _____

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

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People: Function Accountability Chart (FACe)

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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.

Functions	**Person Accountable** (1)	**Leading Indicators** (Key Performance Indicators) (3)	**Results/Outcomes** (P/L or B/S Items) (4)
Head of Company			
Marketing			
R&D/Innovation			
Sales			
Operations			
Treasury			
Controller			
Information Technology			
Human Resources			
Talent Development/Learning			
Customer Advocacy			
Heads of Business Units • _____ • _____ • _____ • _____			

(2) **Identify: 1.** More than 1 person in a seat; **2.** Person in more than 1 seat; **3.** Empty seats; **4.** Enthusiastically rehire?

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People: Process Accountability Chart (PACe)

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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)

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Strategy: Strengths, Weaknesses, Trends (SWT)

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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?

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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)**

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Strategy: One-Page Strategic Plan (OPSP)

Organization Name:

People (Reputation Drivers)

Employees

1. _____
2. _____
3. _____

Customers

1. _____
2. _____
3. _____

Shareholders

1. _____
2. _____
3. _____

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)
		Future Date Revenues Profit Mkt. Cap./Cash **Sandbox**	Yr. Ending Revenues Profit Mkt. Cap. Gross Margin Cash A/R Days Inv. Days Rev./Emp.
	Actions To Live Values, Purposes, BHAG®	**Key Thrusts/Capabilities**	**Key Initiatives**
	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
	Profit per X	**Brand Promise KPIs**	**Critical #: People or B/S** *Between green and red*
	BHAG®	**Brand Promises**	**Critical #: Process or P/L** *Between green and red*

Strengths/Core Competencies

1. _____
2. _____
3. _____

Weaknesses

1. _____
2. _____
3. _____

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Your Name: Date:

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Process (Productivity Drivers)

Make/Buy
1. _____
2. _____
3. _____

Sell
1. _____
2. _____
3. _____

Record Keeping
1. _____
2. _____
3. _____

ACTIONS (QTR) (How)	THEME (Qtr./Annual)	YOUR ACCOUNTABILITY (Who/When)

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

Rocks

		Who
1		
2		
3		
4		
5		

Deadline

Measurable Target/Critical #

Theme name

Scoreboard Design
Describe and/or sketch your design in this space

	Your KPIs	Goal
1		
2		
3		

	Your Quarterly Priorities	Due
1		
2		
3		
4		
5		

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

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

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Strategy: Vision Summary

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Core Values	Purpose	Brand Promises

BHAG®

STRATEGIC PRIORITIES

3-5 Years	1 Year	Quarter

YOUR NAME

	Your KPIs	Goal
1		
2		
3		

Critical #: People or B/S

Between green and red

Critical #: Process or P/L

Between green and red

	Your Quarterly Priorities	Due
1		
2		
3		
4		
5		

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Execution: Who, What, When (WWW)

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Who	What	When

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Execution: Rockefeller Habits Checklist™

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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 accountable 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 accountable 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.

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Cash: Cash Acceleration Strategies (CASh)

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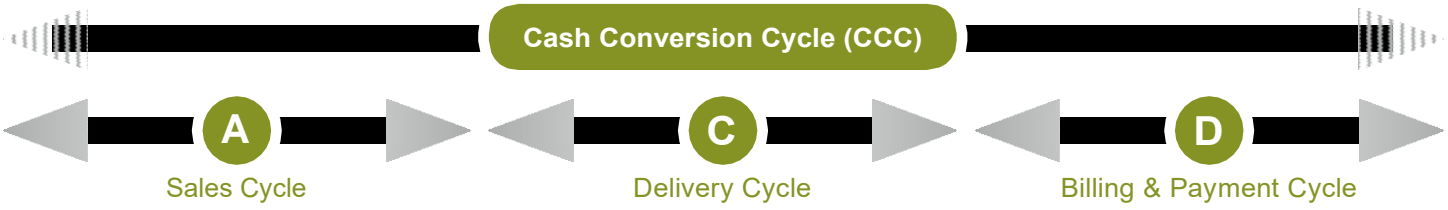

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
Ways to improve your Sales Cycle			
1			
2			
3			
4			
5			
Ways to improve your Make/Production & Inventory Cycle			
1			
2			
3			
4			
5			
Ways to improve your Delivery Cycle			
1			
2			
3			
4			
5			
Ways to improve your Billing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

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Cash: The Power of One

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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	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:

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If we can assist you with implementation of the Rockefeller Habits™, Annual Planning, or to build a One-Page Strategic Plan for your business, please contact us at **coaches@GICoaches.com**

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