



Increasing the Value of Fast Growth Companies.

One-Page Strategic Plan



Opportunities to exceed plan

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5	

Threats to making plan

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

Checklist

Name _____ Company _____ Date _____

- 1) **Everyone aligned with #1 thing that needs to be accomplished this quarter to move company forward**
 - 5 priorities (Rocks) are identified and ranked for the quarter
 - A Critical Number is identified and aligns with the #1 priority
 - A Quarterly Theme is established that brings the key priority/Critical Number alive
 - A scoreboard for the Critical Number is posted and Theme announced
 - All employees know what the Celebration/Reward will be
- 2) **Communication rhythm is established. Information moves through organization accurately and quickly**
 - All employees are in some kind of a daily and weekly huddle
 - Huddles cascade from senior management to frontline or visa versa
- 3) **Every facet of the organization has a person assigned with accountability for ensuring goals are met**
 - Income (P&L), Cash Flow, & Balance Sheet statements have persons assigned to each line item
 - An accountability chart has been created
- 4) **Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities**
 - Employee hassles/ideas/suggestions/issues are being collected weekly
 - There is a systematic process for addressing issues and opportunities
 - Thank You cards are being written every week by senior management
- 5) **Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data**
 - All employees are involved in collecting customer data
 - There is a person assigned accountability for customer feedback
 - All senior leaders communicate with at least one customer weekly
- 6) **Core ideologies are "alive" in the organization**
 - Core ideologies are discovered and defined
 - Stories are being shared of employees who represent the ideologies
 - Core ideologies are included in appraisal and recognition processes
- 7) **Clear understanding of the firm's market position drives strategic planning and sales and marketing**
 - Brand Promise and market (Sandbox) are clearly defined
 - The organization is aligned around 5 key strategies (Thrusts/Capabilities) for growth
- 8) **All employees can report at any time what their productivity is and how it compares against goals**
 - Smart Numbers (key performance indicators) are identified for the organization
 - Weekly measures for each individual/team are clearly displayed and reviewed
- 9) **A "situation room" is established for the weekly executive team meeting**
 - Smart Numbers and Critical Numbers are posted bigger than life with goals clearly shown
 - Data is presented graphically to help visualize trends
 - Core ideologies, priorities, and market maps posted
- 10) **As goes the Executive Team goes the rest of the firm**
 - Team members understand each other's differences, priorities, and styles
 - The team meets offsite every few months for strategic thinking and renewal
 - The team is having fun together