

PROACTIVE
PLANNING TO

Regain Lost Ground and Grow



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Tools for Agile
Leaders to
Align, Accelerate,
and Improve



Corona Virus is Going to Destroy Enough

2000 – Y2K is going to destroy everything

2001 – Anthrax is going to kill us all

2002 – West Nile Virus is going to kill us all

2003 – SARS is going to kill us all

2005 – Bird Flu is going to kill us all

2005 – E-Coli is going to kill us all

2008 – Financial Collapse is going to kill us all

2009 – Swine Flu is going to kill us all

2012 – The Mayan calendar predicts the world ending

2013 – North Korea is going to cause WW III

2014 – Ebola Virus is going to kill us all

2015 – ISIS is going to kill us all

2016 – Zika Virus is going to kill us all

2020 – Corona Virus is going to kill us all?

The truth is FEAR is killing you...

Turn off the TV, pray, trust GOD... and wash your hands!

The 5 WHY's

Core Purpose: Why does your company exist?

Attributes of Differentiating Activities:

- This is a higher purpose beyond profit and jobs
- Does not change in the organization, but inspires change
- Engages your team members inspiration
- Helps teams work around/through obstacles within the team

Start by writing a descriptive statement of your company. What does your company do?

1. WHY is it important?

Note: What was the founder's original passion or purpose in starting the company?

2. WHY does this matter?

3. WHY is it important?

4. WHY does this matter?

Four Types of Core Purpose:

- Service to others
- Search for knowledge and truth
- Pursuit of beauty and excellence
- Desire to change the world

5. WHY is it important?

Notes







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Start Developing Core Values

Name 3 or 4 employees you would enthusiastically rehire tomorrow if you had to rehire your whole team. When you think of each person, what is the one attribute you would use to describe them?

Employee Name




Employee Attribute

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

Name 1 to 3 employees you have terminated in the last 12 to 24 months. When you think of each person, what is the attribute they possessed that did not fit into the company?

Past Employee Name

Past Employee Attribute

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

Develop 3 to 6 Core Value names. Remember to avoid using attributes if possible. Use phrases or descriptors (about 2 to 5 words).

Core Value Names

- _____
- _____
- _____
- _____
- _____
- _____

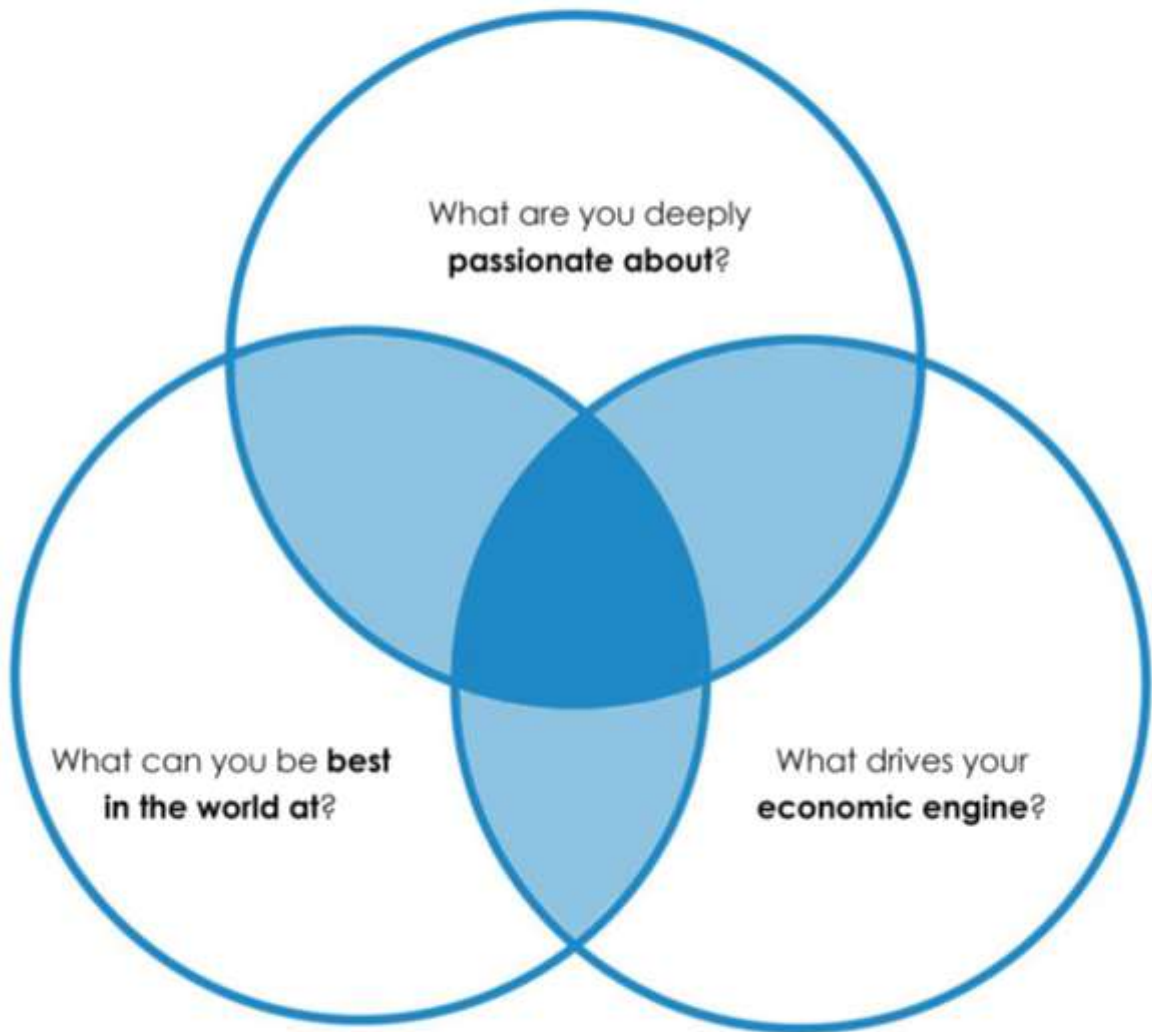


The BHAG™: 10 to 30 Years Out

Big Hairy Audacious Goals (BHAG™) attributes:

- Arises from the Hedgehog Concept in "Good To Great"
- Challenges you to greatness
- Reinforces business fundamentals
- List 3 focuses to develop your BHAG™:

1. _____
2. _____
3. _____



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Rockefeller Habits Checklist™

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 & quickly.**
 - All employees are in 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 & DNA transfer each month.
 - Quarterly and annually, the executive and middle managers meet offsite to work on the Four 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 & 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 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.

Start Stop Keep (SSK)

Rockefeller Habit #5 is Employee Feedback.

A way to gather employee feedback is to ask five employees per week, what we should Start, Stop, and Keep doing.

The information from these interviews should be captured in a feedback log for the purpose of monitoring themes and trends.

Document your conversation

What should we Start doing?

What should we Stop doing?

What should we Keep doing?

Employee 1
Employee 2
Employee 3
Employee 4
Employee 5



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