

# GROWTHTOOLS™

ONE-PAGE TOOLS FOR SCALING-UP THE BUSINESS

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- **PEOPLE:** One-Page Personal Plan (OPPP)  
**PEOPLE:** Function Accountability Chart (FACe)  
**PEOPLE:** Process Accountability Chart (PACe)
- **STRATEGY:** SWT  
**STRATEGY:** 7 Strata  
**STRATEGY:** One-Page Strategic Plan  
**STRATEGY:** Vision Summary
- **EXECUTION:** Who What When (WWW)  
**EXECUTION:** Rockefeller Habits Checklist™
- **CASH:** Cash Acceleration Strategies (CASH)  
**CASH:** The Power Of One

PEOPLE STRATEGY EXECUTION CASH

# 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!**

# People: One-Page Personal Plan (OPPP)

Name: \_\_\_\_\_

Date: \_\_\_\_\_

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

- 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 (KPI's) 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	1 Person Accountable	3 Leading Indicators (Key Performance Indicators)	4 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			
• _____			
• _____			
• _____			
• _____			

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

- [illegible]

### 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	KPI's

## 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

Customers

Shareholders

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 1. _____ | 1. _____ |
| 2. _____ | 2. _____ | 2. _____ |
| 3. _____ | 3. _____ | 3. _____ |

COREVALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)																													
		<table border="1"> <tr><td>Future Date</td><td></td></tr> <tr><td>Revenues</td><td></td></tr> <tr><td>Profit</td><td></td></tr> <tr><td>Mkt Cap/Cash</td><td></td></tr> </table>	Future Date		Revenues		Profit		Mkt Cap/Cash		<table border="1"> <tr><td>YR Ending</td><td></td></tr> <tr><td>Revenues</td><td></td></tr> <tr><td>Profit</td><td></td></tr> <tr><td>MKT Cap</td><td></td></tr> <tr><td>Gross Margin</td><td></td></tr> <tr><td>Cash</td><td></td></tr> <tr><td>A/R Days</td><td></td></tr> <tr><td>Inv. Days</td><td></td></tr> <tr><td>Rev./Emp.</td><td></td></tr> </table>	YR Ending		Revenues		Profit		MKT Cap		Gross Margin		Cash		A/R Days		Inv. Days		Rev./Emp.				
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Strengths/Core Competencies

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Weaknesses:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

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Your Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Process (Productivity Drivers)

*Make/Buy*
*Sell*
*Recordkeeping*

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 1. _____ | 1. _____ |
| 2. _____ | 2. _____ | 2. _____ |
| 3. _____ | 3. _____ | 3. _____ |

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

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

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CORE VALUES	PURPOSE	BRAND PROMISES
<div style="border: 1px solid black; padding: 10px; display: inline-block;"> <b>BHAG</b> </div>		
STRATEGIC		PRIORITIES
3–5 yr	1 yr	Qtr

Your Name: \_\_\_\_\_

Your KPIs		Goal	Your Quarterly Priorities		Due
1			1		
2			2		
3			3		
			4		
			5		

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

*Between green & red*

---

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

*Between green & red*

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 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.

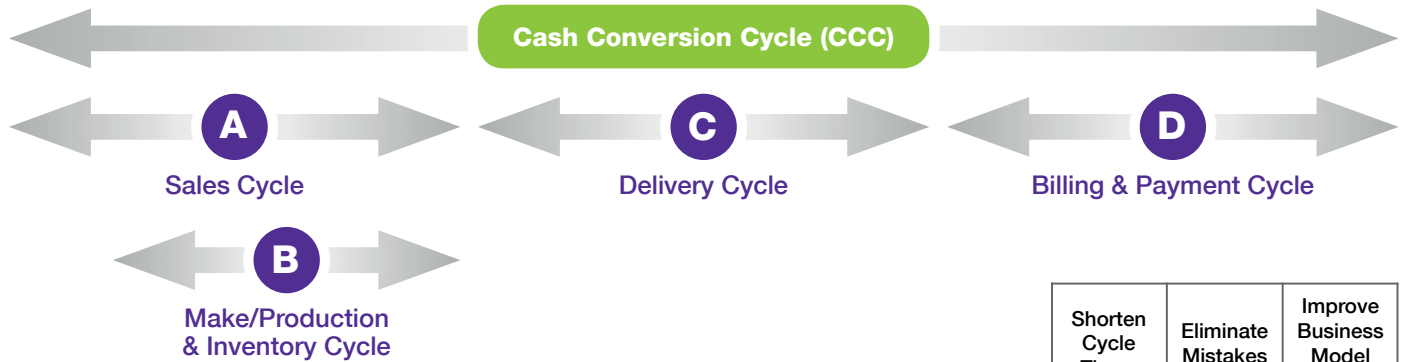
- ☐ Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.
- ☐ Core Customer(s) – Their profile in 25 words or less.
- ☐ 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.
- ☐ Elevator Pitch – A compelling response to the question "What does your company do?"

## 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.



## 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			

# Cash: The Power of One

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

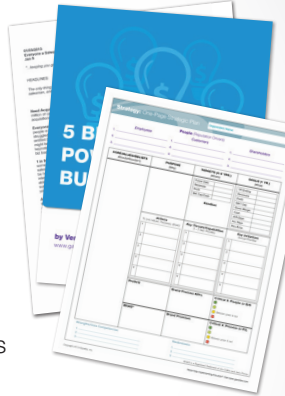
Your Power of One	Change you would like to make	Annual Impact on Cash Flow \$	Impact on EBIT \$
Price Increase %	%		
Volume Increase %	%		
COGS Reduction %	%		
Overheads Reduction %	%		
Reduction in Debtors Days	days		
Reduction in Stock Days	days		
Increase in Creditors Days	days		

<b>Your Power of One Impact</b>		
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Your Power of One	Net Cash Flow \$	EBIT \$
Your <b>Adjusted</b> Position		

## 3 SUGGESTED PRIORITIES FOR GROWING YOUR BUSINESS

1. Sign up for Verne Harnish's **"Weekly Insights"** to receive the latest in ideas, tools, and techniques for growing your business
2. Download editable copies of the **One-Page Strategic Plan** and other One-Page tools – and access a complimentary "vook" (video book) that guides you through each tool
3. Access short **"Growth Guy"** articles offering practical tips on setting up advisory boards, daily huddles for sales people, and 75 other topics.



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PEOPLE STRATEGY EXECUTION CASH

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- ✓ Quickly Update Your KPIs
- ✓ Organized Daily Huddles
- ✓ Task Management
- ✓ Top Priority Calendar
- ✓ Paperless One Page Plan

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Email us at [info@aligntoday.com](mailto:info@aligntoday.com)

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**NOTES:**



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