

WELCOME



SCALING UP
BUSINESS GROWTH
WORKSHOP

SCALING UP
CERTIFIED COACH







1



Dr. Craig Overmyer

- Personal Transformation
- Leadership Transformation
- Cultural Transformation

Cultures That Work,
agree to do what matters,
and know why!



4 Decisions™


2



Dan Hurley

- Strategic Execution
- Organizational Effectiveness
- Leadership Excellence

Creating Conditions
for
Success!



4 Decisions™


3




Workshop Preparation

- ✓ Workshop, not a seminar
- ✓ Prisoners, Vacationers and Sponges
- ✓ Capture the pearls

Introductions

1. Name
2. Company
3. Number of employees








4

Most
SIGNIFICANT
Challenge



& Why



5

Verne Harnish

“Growth Guy”

Rockefeller Habits and
Scaling Up



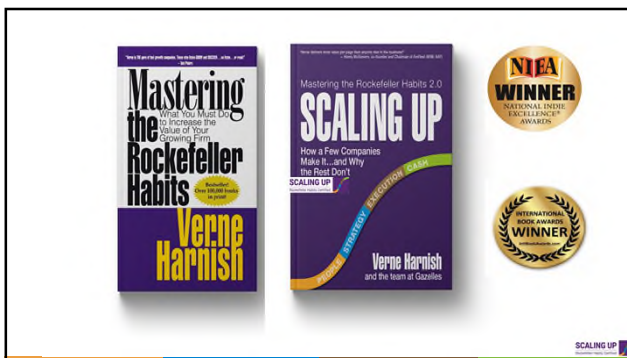





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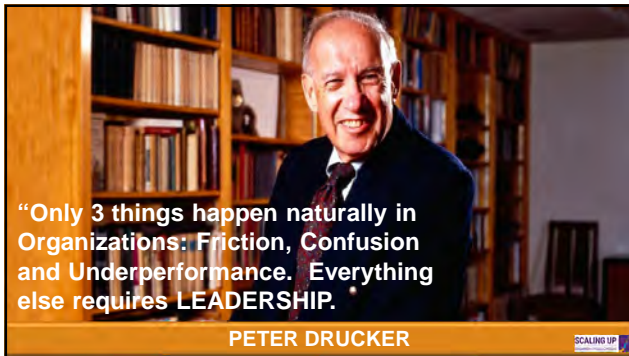
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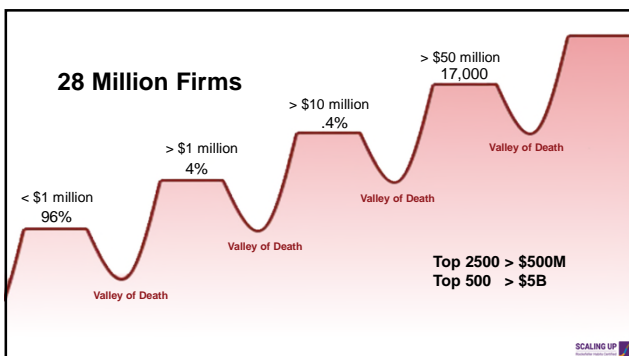
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Five Reasons 8 Out Of 10 Businesses Fail

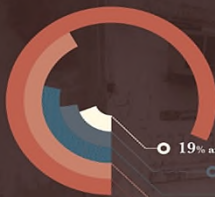
- Reason #1:** Not really in touch with customers and the needs of the marketplace.
- Reason #2:** No real differentiation in the market (read: lack of unique value propositions)
- Reason #3:** Failure to communicate value propositions in clear, concise and compelling fashion.
- Reason #4:** Leadership breakdown at the top (yes -- founder dysfunction).
- Reason #5:** Inability to nail a profitable business model with proven revenue streams.

Source: Forbes Magazine

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Top Reasons Small Businesses Fail



- 19% are outcompeted
- 23% don't have the right team
- 29% run out of cash
- 42% no market need for products or services
- 82% experience cash flow problems

<https://insurancequotes.com/business/why-do-businesses-fail>

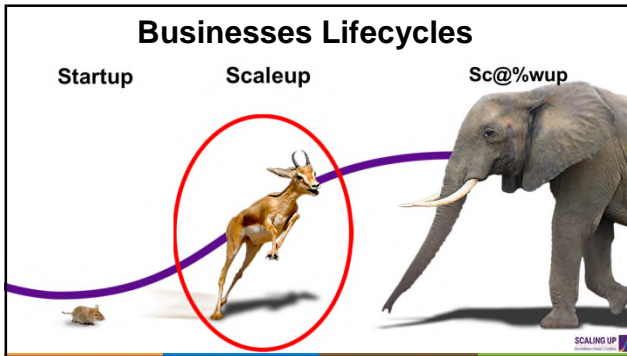
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Putting The Wind In Your Sails

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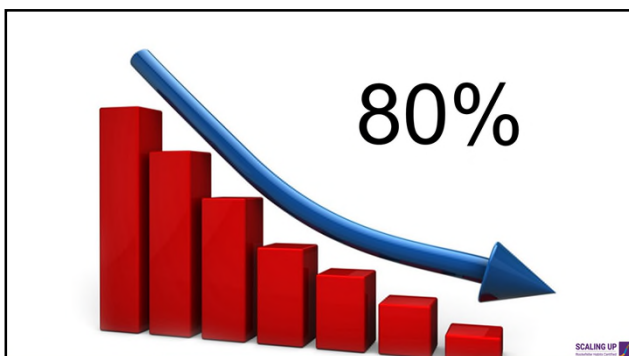
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Keys to Scaling Up

-  Attracting and keeping the right **People**
-  Creating a truly differentiated **Strategy**
-  Driving flawless **Execution**
-  Having plenty of **Cash** to weather the storms

SCALING UP

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The 4 Decisions

PEOPLE
 RIGHT/HAPPY/
 ENTHUSIASTICALLY
 REHIRE

EXECUTION
 EFFECTIVE PROCESSES/
 NO DRAMA/PROFITABLE

STRATEGY
 STATE IT/
 DIFFERENTIATED/
 REVENUE & GROSS
 MARGIN GROWTH

CASH
 OXYGEN/OPTIONS

SCALING UP

25

CASH

Do you have consistent sources of cash, ideally generated internally, to fuel the growth of your business?

**Cash
Conversion
Cycle (CCC)**

**The
Power of 1**

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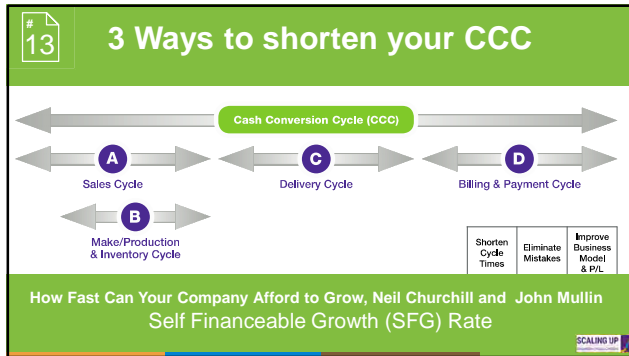
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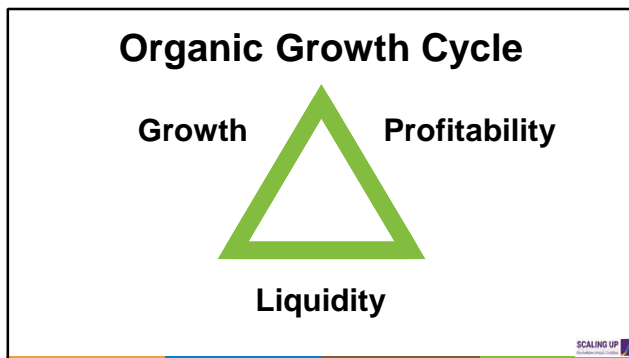
Cash is King!

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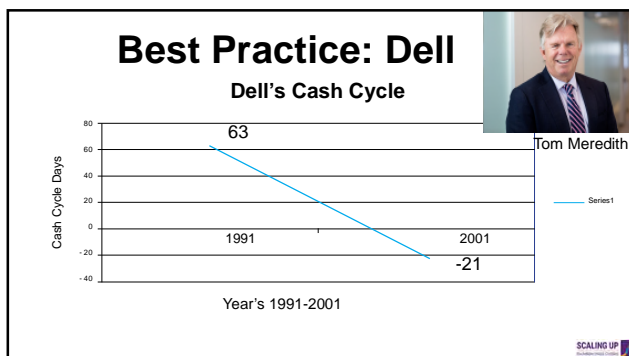
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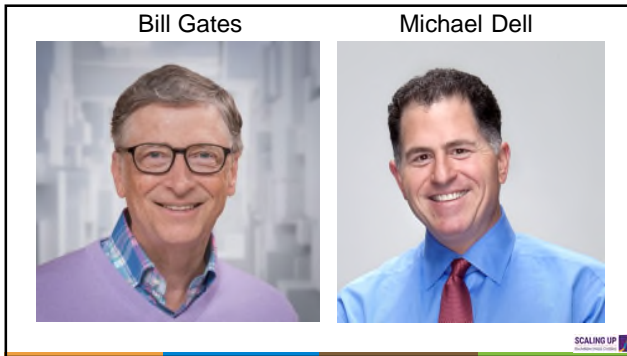
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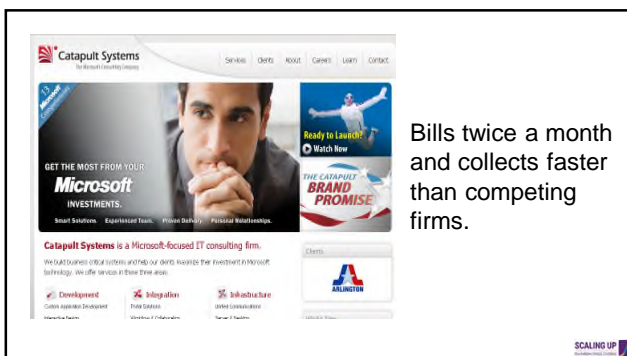
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PPR Travel
www.pprtravel.com

You take good care of your patients.
So who takes care of you?

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Find out more about travel opportunities for RNs in the USA.

International Nurses
Learn about opportunities for International RNs in the USA.

Client / Hospital
Find out how PPR can help you with your healthcare staffing needs.

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Apply Now

PPR Travel's mission is to help healthcare providers and their patients.

WHY PPR | ABOUT PPR | CONTACT PPR

PPR freed up millions.

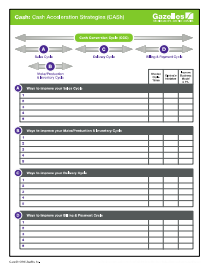
- ✓ Person just to focus timely submission
- ✓ Build relationships with AP
- ✓ Structured invoices per customer
- ✓ Provided pre-review via email/fax
- ✓ Follow-up call 10 days post
- ✓ Blue invoice paper

SCALING UP

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#13

Cash Exercise



Cash Cycle Acceleration Strategies (CASH) ©2014 by Greg Crabtree

1. What is your current cash cycle?

2. What is your target cash cycle?

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100. What is your target cash cycle?

SCALING UP

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FOUNDED BY GREG CRABTREE
Author: Greg Crabtree
SIMPLE NUMBERS,
STRAIGHT TALK,
BIG PROFITS!
A KEY TO UNLOCK YOUR
BUSINESS POTENTIAL
GREG CRABTREE
WITH REBECCA BEALE HARTZOG



To effectively scale your business you need 3x to 10x the cash reserves of your competitors.

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The Power of 1

The 7 "Levers"

- ✓ Price
- ✓ Volume
- ✓ Cost of goods sold (COGS)
- ✓ Operating expenses
- ✓ Accounts receivable
- ✓ Inventory/work in progress
- ✓ Accounts payable

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INSIGHTS

- CAPTURE YOUR INSIGHTS AND WHAT NEEDS TO BE IMPROVED
- PLACE ON INSIGHT BOARD

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BREAK

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BUSINESS GROWTH
WORKSHOP

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Gazelles COACHES

CULTURES THAT WORK

Zing TRAIN

think switch

STRATECUTION

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PEOPLE

Are the stakeholders (employees, customers, shareholders) happy and engaged; and would you enthusiastically “rehire” them?

5 Dysfunctions of a Team

Functional Accountability Chart (FACe)

Process Accountability Chart (PACe)

Talent Assessment A, B or C Players

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C O R E V A L U E S

L E A R N I N G

MANAGERS **TEAM**

LEADERS

P U R P O S E

C U L T U R E

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C O R E V A L U E

L E A R N I N G

MANAGERS **TEAM**

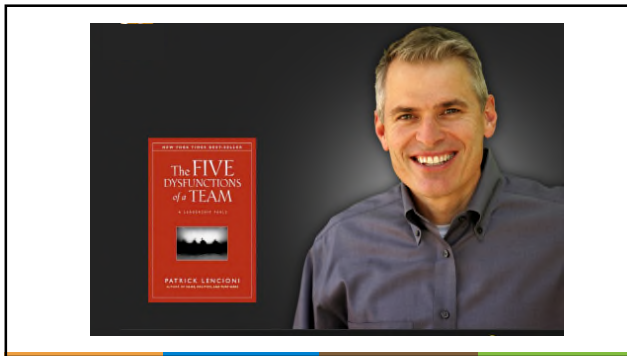
#1 LEADERS

P U R P O S E

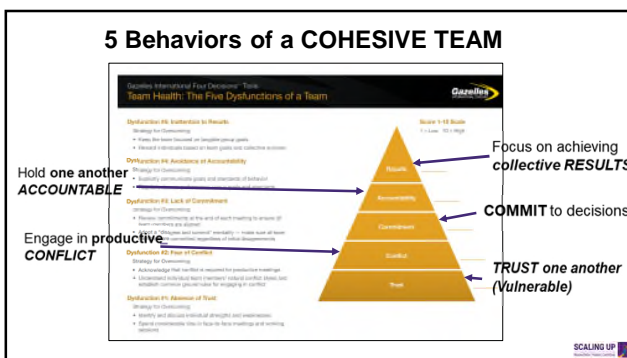
C U L T U R E

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Building a High-Performance Leadership Team

- Trust: Share personal histories (lifeline exercise)
- Conflict: Assess and share personal conflict profiles
- Commitment: Learn “discuss, disagree and commit”
- Accountability: Conduct a peer feedback exercise
- Results: Employ a dashboard for peer (public) visibility

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Mindful Leadership at Every Level

A Virtual Training Course to Accelerate the Momentum of Business Growth

In-The-Moment Conversations™

The Missing Conversations... Before It's Too Late

46

EVERYTHING **DiSC**
A Wiley Brand

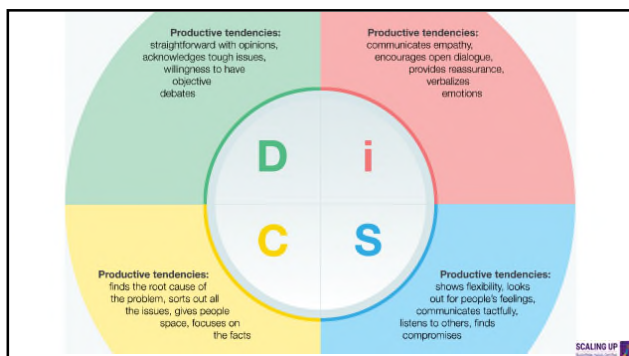
Everything DiSC® Productive Conflict

Dr. Craig Overmyer

CULTURES THAT WORK

Cultures That Work
9640 Commerce Dr.
Carmel, IN 46032
317-506-5795


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[illegible]

Function Accountability Chart (FACe)



Complete the FACe form for your business.

Do you have:

- ✓ More than one person in a seat
- ✓ Person in more than one seat
- ✓ Empty seats
- ✓ Enthusiastically rehire

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2 Demands

PEOPLE
(Relationship)




PROCESS
(Transactions/Activities)



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Core Processes



- ✓ Critical to the business success
- ✓ Often cross functional
- ✓ No one accountable leader
- ✓ 4 to 9 across the business
- ✓ Must document, measure, improve

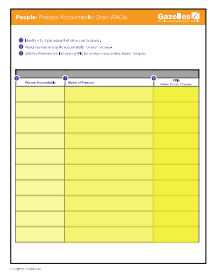
Examples: Product development and launch; sales to cash; hiring and onboarding new employees; customer service

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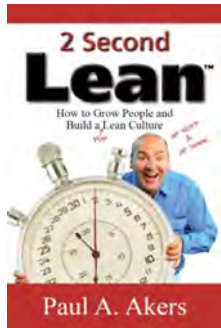
Process Accountability Chart (PACe)




- 1 Name of Process
- 2 Person Accountable
- 3 KPI's

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GETTING STARTED WITH 2 SECOND LEAN



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Ken Sim





Nurse Next Door™
Home Healthcare Services

2x without adding HQ staff

57



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Right Seats – Are we clear ab out the necessary functional roles for this point in our life cycle?

Right People – Have we identified the required knowledge, skills, qualities and character that will assure success in each seat?

Right things – Are they doing what must be done to achieve our most important priorities each quarter, month, week and day?

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Do you have the right...





people on the bus?

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The Atkins Group Bus Tour



SCALING UP
Mastering the Art of Growth

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Zappos.com
POWERED by SERVICE™

Tony Hsieh, Zappos CEO

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Mastering the Art of Growth

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Topgrading®
*Proven Hiring
and Promoting
by Dr. Brad Smart.*



GROWTH INSTITUTE
A SHARPSOURCE COMPANY

PROCESSING | DIVERSITY | ANALYSIS | RESEARCH | CONTACT US

Are you hiring the right people to grow your business?

DON'T BELIEVE THE RESUME!
The fastest thing to corporate performance is poor hiring. The Topgrading System will increase your business' performance by hiring the right people.

Topgrading
HOW TO FIND IT

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Mastering the Art of Growth

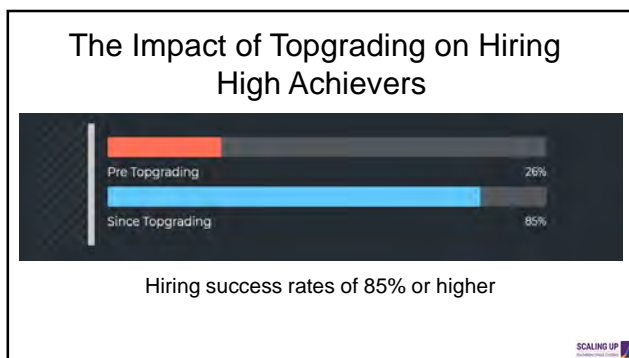
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- ✓ Topgrading Scorecard
- ✓ Screening Interview
- ✓ Tandem Interview
- ✓ TORC Technique



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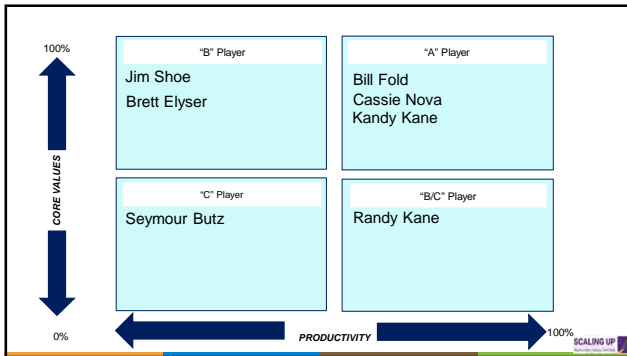


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More Than Knowledge or Skill

- **Will** – desire to excel, act with courage, persevere, learn and innovate
- **Values** – test for culture fit – do they align with your core values
- **Results** – in the end can they deliver on KPIs/outcomes
- **Skills** – the least important since most skill-sets need updating every 5 years.

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MINDFUL LEADERSHIP AT EVERY LEVEL

- Coaching up
- Coaching out
- Redeploying chronic B's and C's



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The #1 key for being a successful leader is...

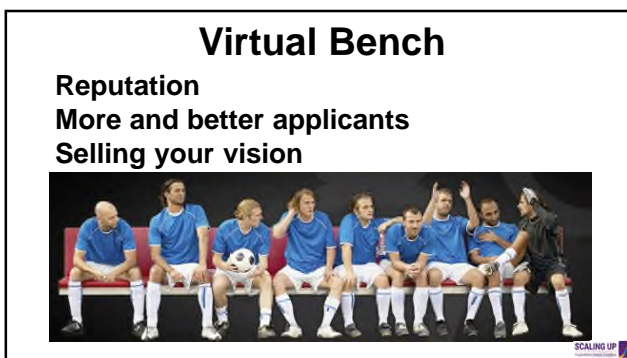
1 to 1 Coaching

- ✓ Clarity of priorities
- ✓ Performance progress
- ✓ Building trust
- ✓ Strengthening alignment
- ✓ Focusing efforts
- ✓ Deeper experience

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Employee Engagement



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Employee Engagement

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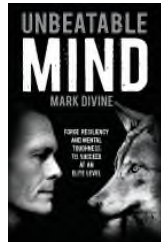
Cobalt Corp. October 2017



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Employee Engagement

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MARK DIVINE – EX NAVY SEAL • AUTHOR • COACH

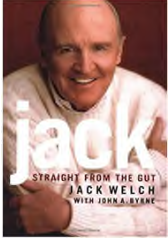


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Employee Engagement


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5 Key Attributes of Successful Managers

1. Hire fewer people; pay them more



$\begin{matrix} < \\ > \end{matrix}$






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1. Hire fewer people; pay them more

\$20.89/hr	\$12.67/hr
\$620,000 Revenue/Employee	\$211,00 Revenue/Employee
\$1,118/sq ft	\$680/sq ft
24% Turnover	50%* Turnover
	

Retail industry average

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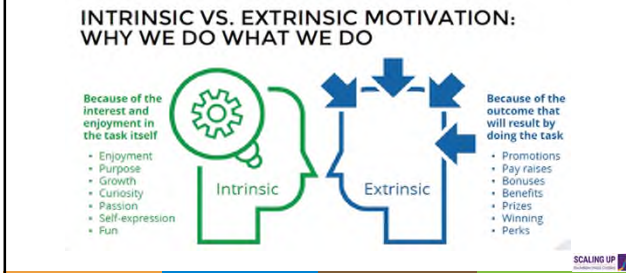
2. Help people play to their strengths



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3. Proactively recognize; show genuine appreciation



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INSIGHTS

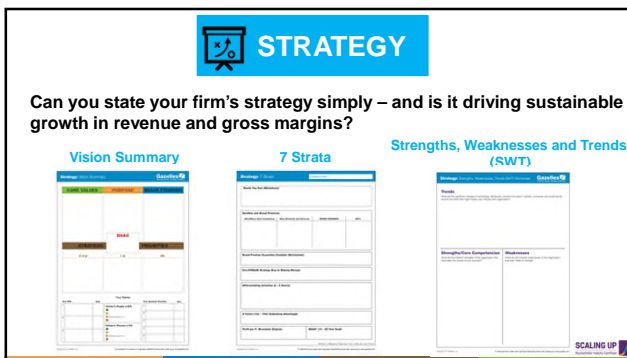
- CAPTURE YOUR INSIGHTS AND WHAT NEEDS TO BE IMPROVED
- PLACE ON INSIGHT BOARD

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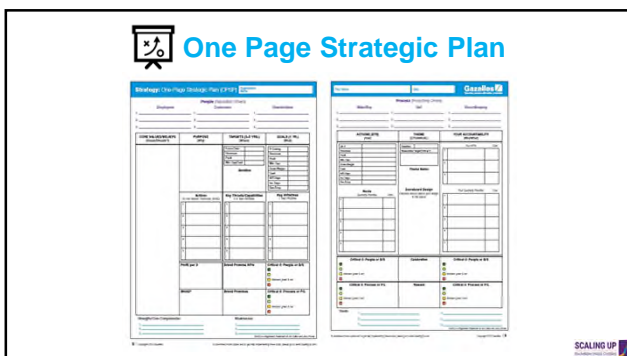
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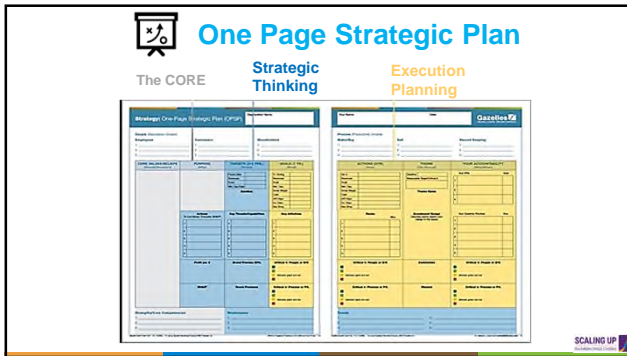
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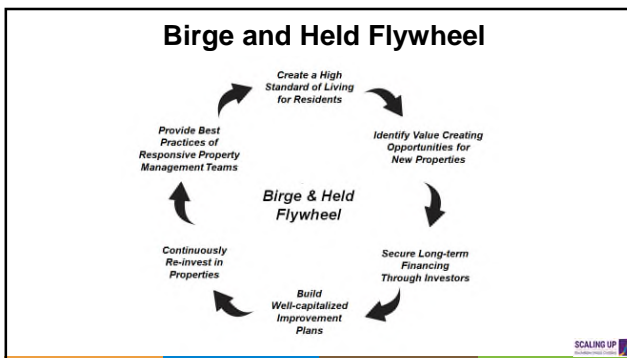
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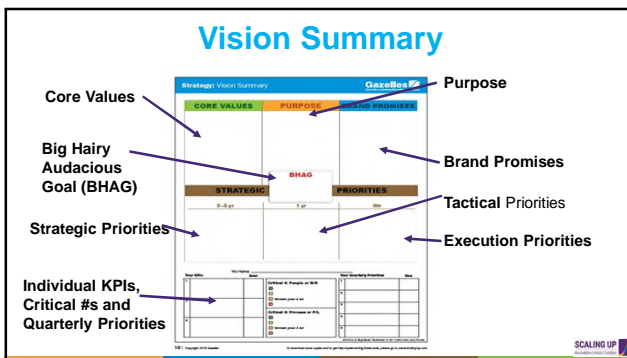
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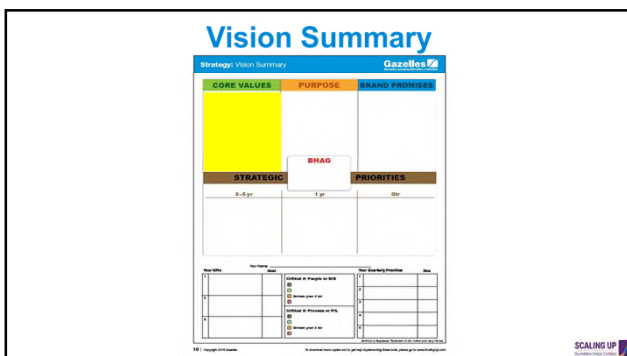
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Are your Core Values alive in your Organization?



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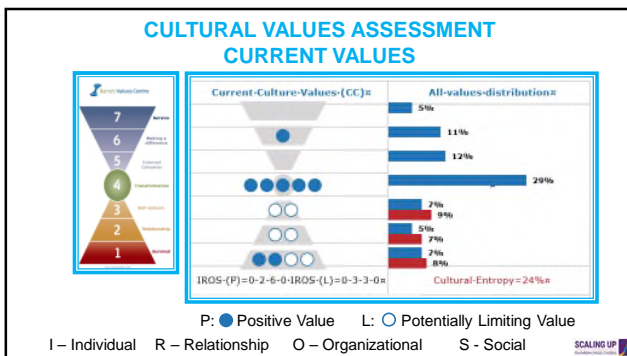
Core Values Tests

- Fire an offender
- Take a financial hit
- Alive among people today

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Entrepreneurial Growth

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COMMUNITY

We define our community as the HKP family, customers, neighborhoods, and partners. We will have a positive effect on each community in which we work.

Participate

Be an active member of your work group, HKP and your community.

Cultivate

Positive relationships and experiences with those in our community.

Make a difference

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Entrepreneurial Growth

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COMMITMENT

We set clear goals and objectives; then, we persevere. Regardless of the challenge, we face it together. This may mean working after hours, extensive negotiations, or creative solutions, but we see it through to the end.


Create solutions
Understand the big picture and work through problems.

Resilient
Get back up after being pushed down and get through roadblocks to get to the goal line.

Own your work stream
Be responsible and accountable for your work that helps HKP meet.

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HUMAN CAPITAL

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CULTURE

As a team, we add value to the work we do in a competitive environment. Our employees seek to learn and gain new skills through coaching, professional development, and continuous improvement.

Collaborate
With your team and HKP so you and HKP can grow.

Be flexible
Be open to new ideas, but be mindful of policies.

Compete
Work together to achieve success in the marketplace.

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HUMAN CAPITAL



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HOW HKP STARTED THIS PROCESS



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HUMAN CAPITAL


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Verne Harnish

- ✓ Practice what we preach
- ✓ Nothing but ecstatic customers
- ✓ Value that exceeds expense
- ✓ Honor intellectual capitalists
- ✓ Everyone an entrepreneur
- ✓ Never, ever, give up

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It's all about BEHAVIOR!

Fundamental 1

CUSTOMER

Do what's best for the customer

In all situations, do what's best for the customer, even if it is to our own detriment. There's no greater way to build a reputation than to steadfastly do what's right for others. Every day.

Fundamental 3

Make quality personal

Take pride in the quality of everything you touch and everything you do. Always value yourself. To this day, level work? Everything you touch has your signature. Sign it in bold ink!

Fundamental 8

We honor our commitments

Honor commitments

There's no better way to earn people's trust than to be true to your word. Do what you say you're going to do, when you say you're going to do it. This includes being on time for all phone calls, appointments, meetings, and promises. Allow extra time for surprises and delays, and don't let those become excuses.

Fundamental 11

NO EXCUSES!

Find a way

Take personal responsibility for making things happen... somehow, someday. Respond to every situation by looking for how we can do it, rather than explaining why it can't be done. Do resourceful and show initiative.

<https://www.highperformingculture.com/hpc-way/>


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Mission to Mars

The 5-7 passengers on the Mission to Mars rocket that best represent your culture:

- High credibility with peers
- Most competent in their roles
- Gut-level understanding of core values

Who? (Names)	Why? (Attributes)
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
6. _____	6. _____
7. _____	7. _____




Our Core Values

Core Values Criteria

- Small set of timeless principles
- Intrinsic value and importance
- Independent of operational realities

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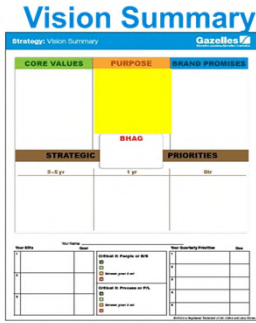
DriBot Team post-its, working on naming the Core Values after the Mission To Mars Exercise

Serve Customers Tenaciously
Engage mindfully through respect, empathy, and fun.

Discover Innovative Solutions
Persist in problem-solving through continuous learning and precision.


Deliver Extraordinary Results
Roll up your sleeves, be accountable, and follow through.

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Reason for Existence - Purpose



Questions that lead to “discovery” of purpose

- Why does our organization's existence matter?
- What is our most important reason for being here? Why?
- What would be lost if this organization ceased to exist?
- Why are we important to the people we serve?
- Why would anyone dedicate their precious time, energy, and passion to our company? (Note: the answer is not money.)

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Extra 40% Discretionary Effort



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LinkedIn

"To connect the world's professionals to make them more productive and successful."

Alibaba Group

"To make it easy to do business anywhere."



"To give people the power to share and make the world more open and connected."

PayPal

"To build the Web's most convenient, secure, cost-effective payment solution."

asana

"To help humanity thrive by enabling all teams to work together effortlessly."

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Purpose – WHY

Innovation

3M Worldwide

WAL-MART

Robin Hood

Winning



Microsoft

Ubiquity

Happiness



Third Place

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Your Business' Reason for Existence – Purpose Exercise

Attributes of a company's Core Purpose:

- Higher purpose (beyond profit and jobs)
- Does *not* change...but inspires change
- Engages team members emotionally
- Causes team to work around/through obstacles

Descriptive Statement
 "What does your company do today?"

1. WHY is it important?
 2. WHY does this matter?
 3. WHY is it important?
 4. WHY does this matter?
 5. WHY is it important?

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

Four Types of Core Purposes:

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

OUR CORE PURPOSE

SCALING UP

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The Three Little Pigs

THE PSYCHOLOGY OF PERSUASION
 ROBERT C. CIALDINI, PH.D.

THE BIG THREE MEET (1945)

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Anti-Brand Promises

Brand Promises

Trade-Offs

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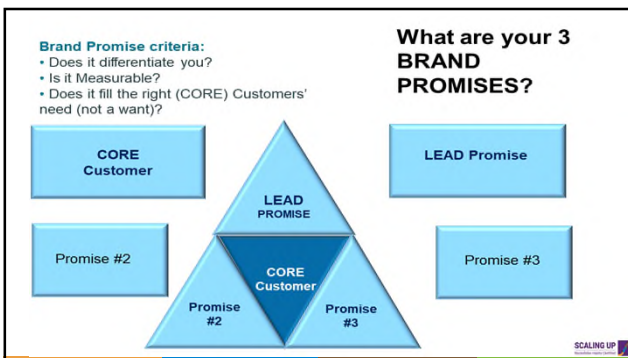
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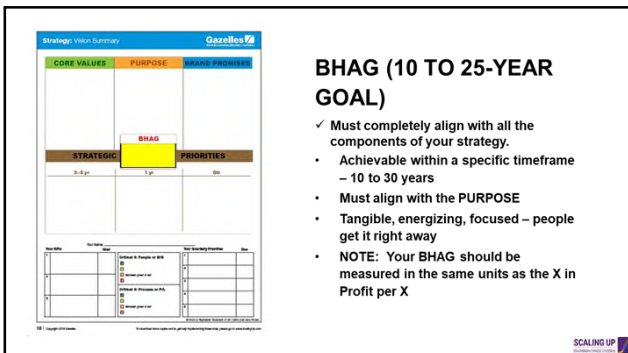
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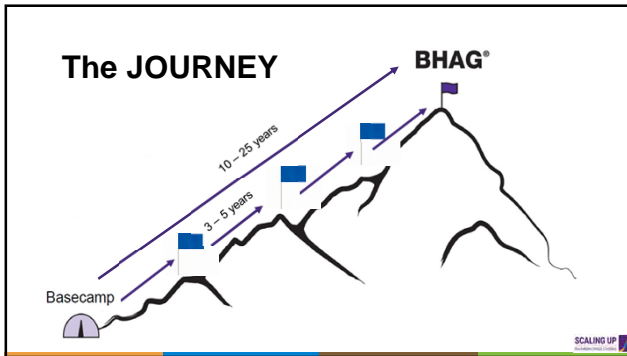
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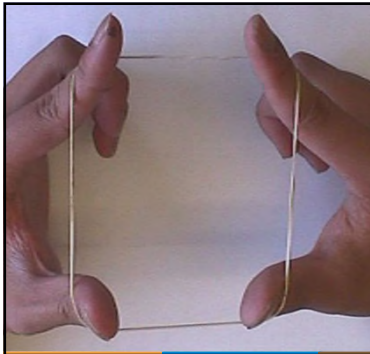
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What is a BHAG?

- Term coined by Porras & Collins in the book *Built to Last*
- 10+ year visionary goal
- Should be daunting inviting a significant reach
- Needs clear finish line
- Challenges you to greatness

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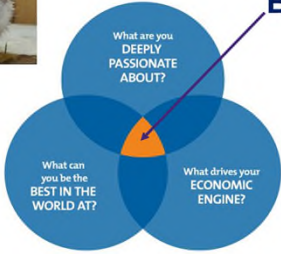
Why do we need a BHAG?

- ✓ Stretch creates dynamic energy
- ✓ Necessity is the mother of invention
- ✓ The basis for planning is not knowing today how we will reach our BHAG
- ✓ To guide us as we decide what to say YES to and what to say NO to

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Hedgehog Concept



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Southwest Airlines

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BHAG Types

Competitive

- Nike: Crush Adidas
- Honda: Destroy Yamaha

Target Oriented

- Subway: 32 Stores
- Starbucks: #1 Consumer Brand
- GE: #1 or 2 or out

Role Model

- Stanford: Become the Harvard of the West
- Giro: Become the Nike of the cycling industry

Transformational

- Merck: Transform this company from a chemical manufacturer into one of the preeminent drug-making companies in the world.

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TIP

/

Financial
(i.e. \$1 B in Sales)



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So what's your Big Hairy Audacious Goal

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BHAG Worksheet

What are you DEEPLY PASSIONATE ABOUT?

What can you be the BEST IN THE WORLD AT?

What drives your ECONOMIC ENGINE?

BHAG

Your BHAG

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Strategic Priorities

3 – 5 Yr. Key Thrusts & Capabilities

- ✓ New product launches
- ✓ Refocusing of business
- ✓ Upgrading skills

The year's #1 priority.

The quarterly priorities necessary to achieve the yearly priority.

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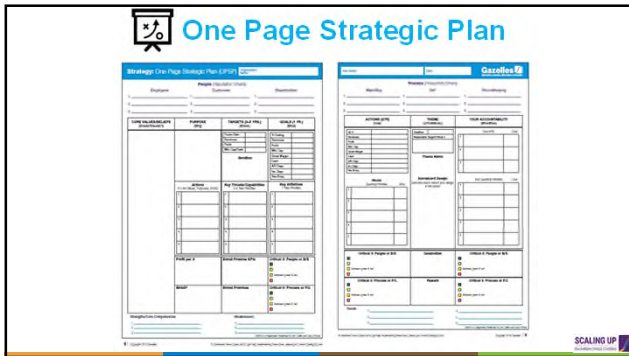
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Your Name: _____

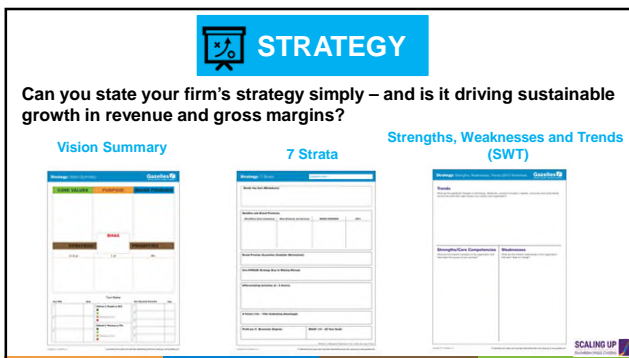
Your KPIs	Goal	Critical #1: People or B/S	Your Quarterly Priorities	Due
1		<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: green; margin-right: 5px;"></div> <div style="width: 100%; border-bottom: 1px solid black;"></div> </div>	1	
2		<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: orange; margin-right: 5px;"></div> <div style="width: 100%; border-bottom: 1px solid black;"></div> </div>	2	
3		<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: red; margin-right: 5px;"></div> <div style="width: 100%; border-bottom: 1px solid black;"></div> </div>	3	
		<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: green; margin-right: 5px;"></div> <div style="width: 100%; border-bottom: 1px solid black;"></div> </div>	4	
		<div style="display: flex; align-items: center;"> <div style="width: 10px; height: 10px; background-color: orange; margin-right: 5px;"></div> <div style="width: 100%; border-bottom: 1px solid black;"></div> </div>	5	

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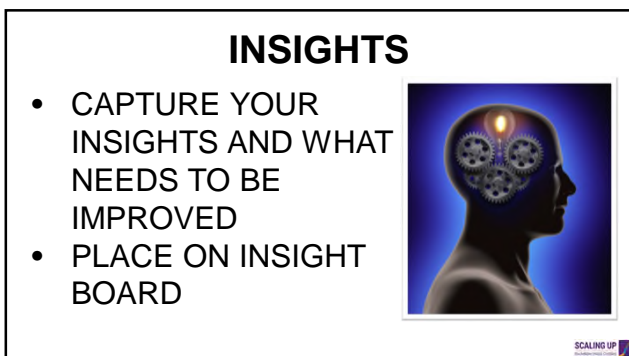
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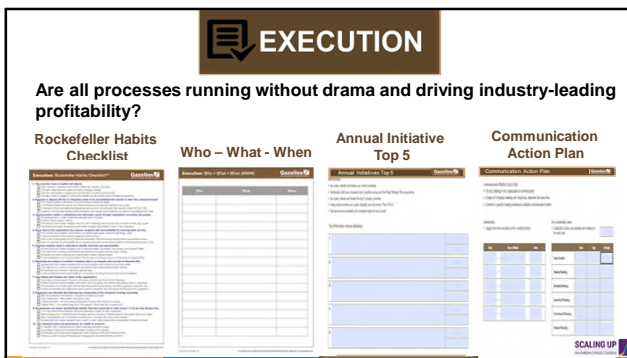
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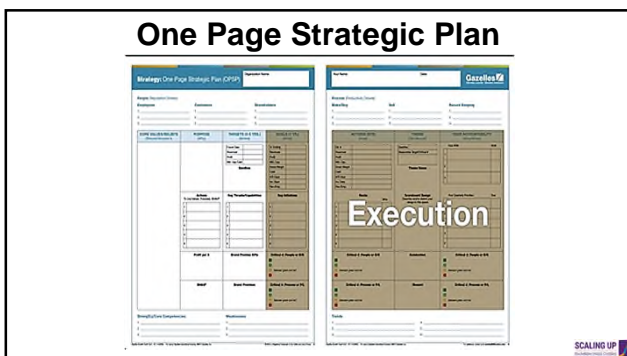
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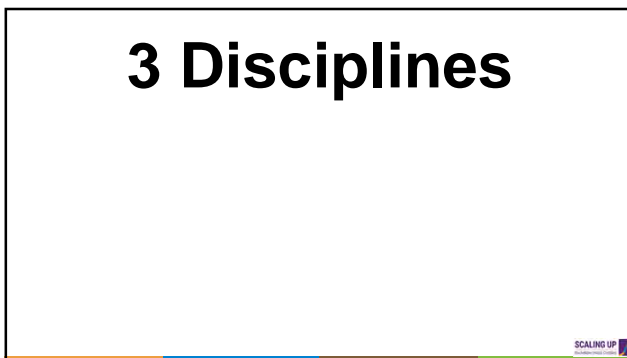
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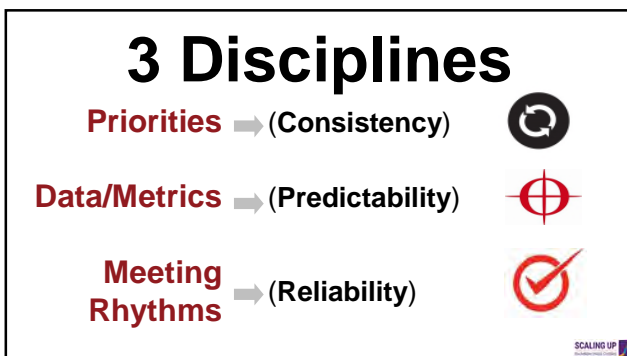
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The executive team is healthy & aligned.

- Understand each other
- Frequent strategic sessions
- Ongoing executive education
- Comfortable with full participation

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Stanley McChrystal

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"If someone were to ask me to make a list of the most valuable qualities a person should develop in order to thrive in the world of work — and for that matter life — I would put being a team player on top."

Pat Lencioni

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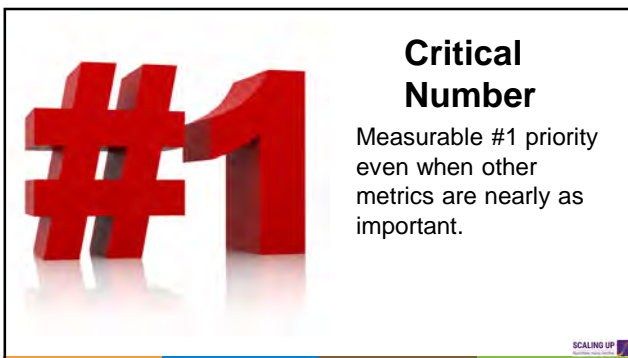
#2 Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move the company forward.

- ☐ Critical Number
- ☐ 3 – 5 priorities
- ☐ Quarterly Theme & Celebration
- ☐ Visibility of Critical # & Theme

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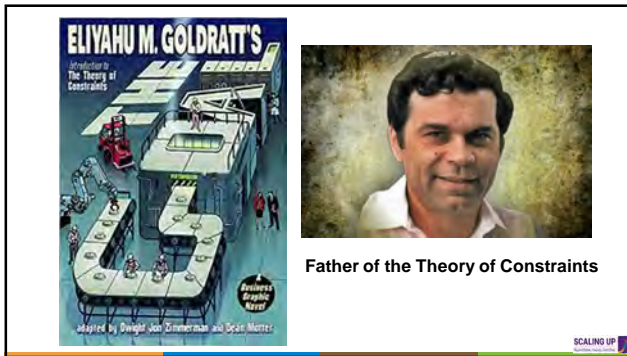
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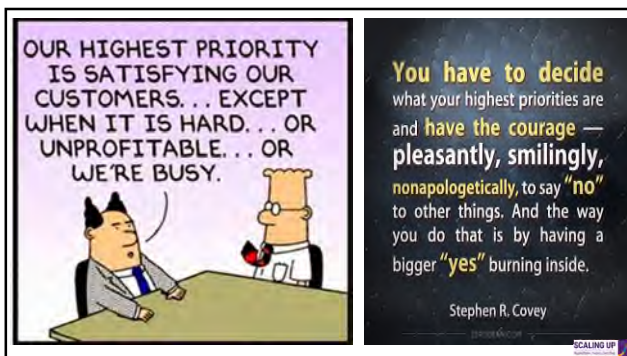
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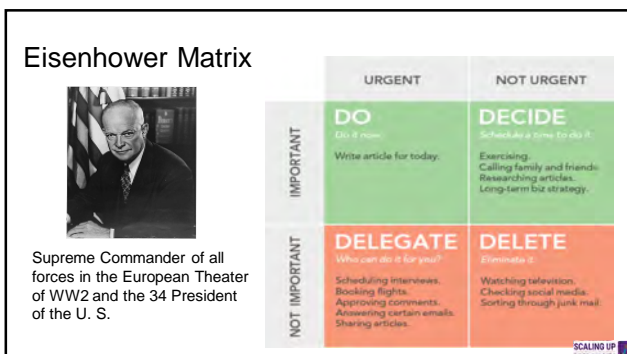
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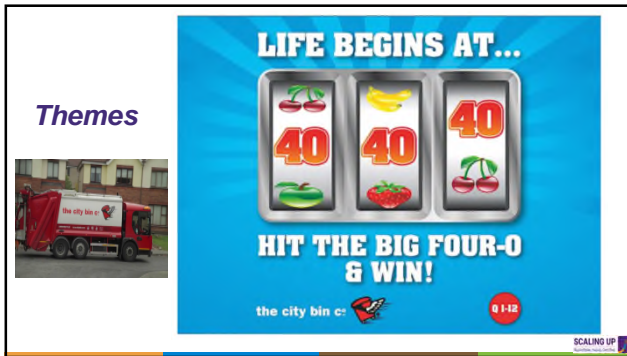
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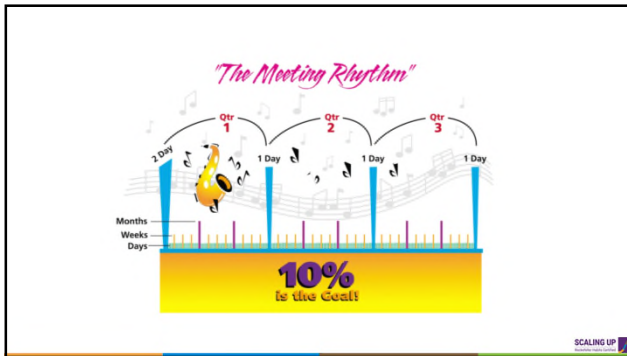
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3

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

- ☐ Huddle < 15 minutes
- ☐ Weekly teams meeting
- ☐ Monthly manager's meeting
- ☐ Quarterly/Annual planning meeting

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Meeting Rhythm	
Daily 5-15 min	➔ Tactics/Communication
Weekly 60-90 min	➔ Priorities/Debate
Monthly 4-8 hours	➔ Big Issues/DNA Transfer
Quarterly 1-2 days	➔ Planning/Focus/Priorities
Annual 2 days	➔ Planning/Clarity/Alignment

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Meeting Rhythm	
Daily 5-15 min	➔ Tactics/Communication
Weekly 60-90 min	➔ Priorities/Debate
Monthly 4-8 hours	➔ Big Issues/DNA Transfer
Quarterly 1-2 days	➔ Planning/Focus/Priorities
Annual 2 days	➔ Planning/Clarity/Alignment

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Daily Huddle

- ✓ 5 to 15-minute meeting
- ✓ Set for ODD time i.e., 8:08, 11:11, 1:01
- ✓ Start and stop ON TIME
- ✓ Be succinct and specific
- ✓ Stand during meeting
- ✓ Everyone in the unit attends
- ✓ Facilitated by anyone who is structured and disciplined
- ✓ Use a timer or stopwatch initially
- ✓ Agenda: What's up, daily metrics, where are you stuck

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Biz Group's Huddle Agenda



- ✓ Good news
- ✓ Metrics
- ✓ Focus for the day
- ✓ "Stucks"
- ✓ "Ah ha's"

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Weekly – Agenda

- ✓ **Good News** – 5 mins
- ✓ **Priorities & The Numbers** – 10 mins
- ✓ **Customer/Employee Data** – 10 mins
- ✓ **Collective Intelligence** – 30 mins
- ✓ **Who, What, When Summary**
- ✓ **One Phrase Close**

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Monthly Meeting

- ✓ ½ to full day meeting
- ✓ Includes everyone who supervises or manages anyone
- ✓ Opportunity to instill senior leadership's "DNA" - Programming
- ✓ Address 1 to 2 major issues
- ✓ Learning and development opportunity – TRAINING
- ✓ Share knowledge and best practices

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Quarterly and Annual meetings

- ✓ 1 to 2 days of strategy formulation and execution planning
- ✓ Completion of Growth Tools
- ✓ Set direction and focus for the year and quarter
- ✓ Achieve clarity, alignment and focus
- ✓ Continue development of leadership and staff

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Meeting Effectiveness

How can we assure that our meeting are consistently productive and assure continual acceptance and adaptation?

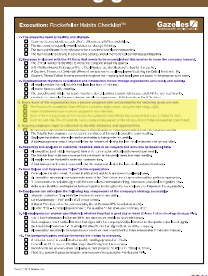
START
STOP
KEEP

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

- ☐ FAcE complete – RIGHT
- ☐ Financial accountability
- ☐ PAcE accountability
- ☐ Thrust/Capability accountability



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Function Accountability Chart (FAcE)




Complete the FAcE form for your business.

Do you have:

- ✓ More than one person in a seat
- ✓ Person in more than one seat
- ✓ Empty seats
- ✓ Enthusiastically rehire


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P/L Statement Example



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Process Accountability Chart (PACE)



- 1 Name of Process
- 2 Person Accountable
- 3 KPI's

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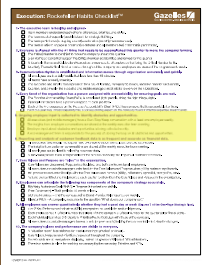
Every 3 to 5-year Key Thrust/Capability has a corresponding expert on the advisory board IF internal expertise doesn't exist.

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

- ☐ Start-Stop-Keep w/employees
- ☐ Insights shared weekly meeting
- ☐ Employee input collected weekly
- ☐ Mid-management closes loop



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#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 shared at the weekly team meeting.
- ❑ All employees involved in collecting.
- ❑ Mid-management responsible for closing the loop on all customer feedback.



The screenshot shows a Salesforce report titled "Customer Feedback by Product". The report is a table with columns for "Product", "Feedback", and "Status". The "Product" column lists various products like "Salesforce CRM", "Salesforce Marketing Cloud", etc. The "Feedback" column contains text entries, some of which are highlighted in yellow. The "Status" column shows the status of each feedback item, such as "Open", "Closed", or "In Progress". The report is filtered by "Product" and "Status".

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4Q Conversation Questions



- ✓ How are you doing?
- ✓ What's going on in your industry/neighborhood
- ✓ What do you hear about our competitors?
- ✓ How are we doing?

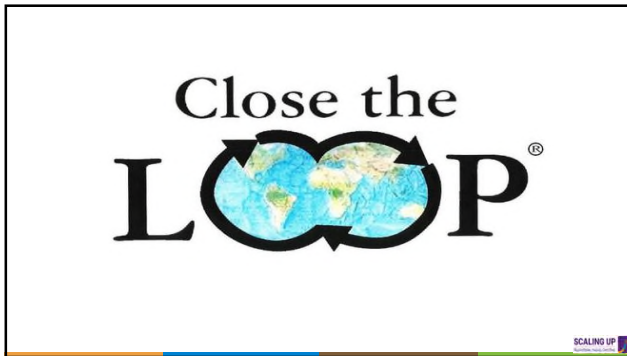
ALL executives and mid-managers converse with at least one end user weekly.



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A group of eight business professionals, four men and four women, are seated around a large, dark wooden conference table in a modern office setting. They are all dressed in business attire. The participants are engaged in a meeting, with some looking at laptops, others at documents, and one woman pointing at a screen. The room has large windows in the background, letting in natural light. The overall atmosphere is professional and collaborative.

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#

7

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

- ❑ Core Values are discovered, Purpose is articulated, and both are known by all employees.
- ❑ Examples of Core Values and Purpose are addressed when giving praise or reprimands.
- ❑ HR processes are aligned with Core Values and Purpose.
- ❑ Quarterly actions are taken to strengthen the Core Values and Purpose.

The screenshot shows a checklist titled "Executive Purpose & Values Checklist" with various items related to organizational purpose and values, some of which are highlighted in yellow.

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#

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) – the 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?"

The screenshot shows a checklist titled "Executive Purpose & Values Checklist" with various items related to organizational purpose and values, some of which are highlighted in yellow.

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#9

All employees can answer quantitatively whether they had a good day or week.

- ❑ 1 or 2 Key Performance Indicators (KPIs) reported weekly for per role/person
- ❑ All have 1 critical number that aligns with the company's Critical Number for the quarter (clear line of sight).
- ❑ All have 3-5 Quarterly Priorities aligned with those of company.
- ❑ All execs and middle managers have a coach providing accountability.

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Each role/person reports on 1 – 2 KPIs weekly

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#1

Critical Number

Each employee has clear line of sight.

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Quarterly Action Plan for Q1, 20XX

Focus Area One:
 Key Initiatives: Launch new product line, Expand into new markets.
 Categories of Business: New Product Development, Sales & Marketing.
 Key Action Items: 1. Conduct market research for new product line. (Owner: John Doe, Due: 01/15/20XX) 2. Develop product specifications for new product line. (Owner: Jane Smith, Due: 01/20/20XX) 3. Launch new product line in Q1. (Owner: John Doe, Due: 01/31/20XX) 4. Expand into new markets in Q1. (Owner: Jane Smith, Due: 01/31/20XX)

Focus Area Two:
 Key Initiatives: Improve operational efficiency, Reduce costs.
 Categories of Business: Operations, Finance.
 Key Action Items: 1. Identify areas for operational improvement. (Owner: John Doe, Due: 01/15/20XX) 2. Implement operational improvements. (Owner: Jane Smith, Due: 01/20/20XX) 3. Review operational costs and identify areas for reduction. (Owner: John Doe, Due: 01/31/20XX) 4. Implement cost reduction measures. (Owner: Jane Smith, Due: 01/31/20XX)

Focus Area Three:
 Key Initiatives: Strengthen customer relationships, Increase customer loyalty.
 Categories of Business: Customer Service, Sales & Marketing.
 Key Action Items: 1. Conduct customer satisfaction survey. (Owner: John Doe, Due: 01/15/20XX) 2. Implement customer service improvements. (Owner: Jane Smith, Due: 01/20/20XX) 3. Launch customer loyalty program. (Owner: John Doe, Due: 01/31/20XX) 4. Increase customer loyalty in Q1. (Owner: Jane Smith, Due: 01/31/20XX)

3 - 5 Priorities Matrix:

	URGENT	NOT URGENT
IMPORTANT	DO IT NOW	PLAN IT
NOT IMPORTANT	DELEGATE	DROP IT

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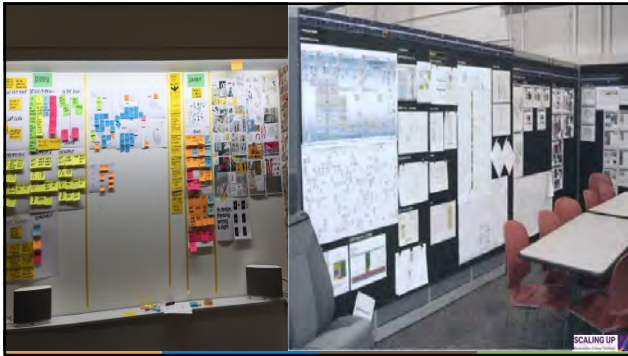
Accountability for behavioral change

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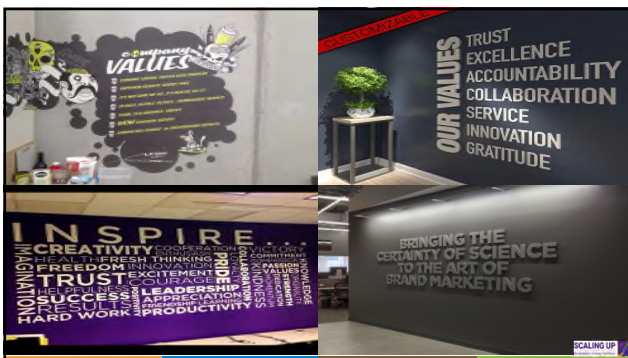
The company's plans and performance are visible to everyone.

- ❑ "Situation room" created for weekly meetings.
- ❑ Core Values, Purpose and Priorities posted.
- ❑ Scoreboards are up everywhere displaying progress on Priorities and KPIs.
- ❑ A system is used to manage cascading Priorities and KPIs.

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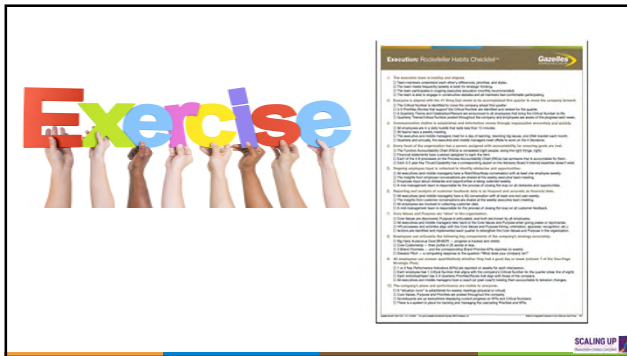
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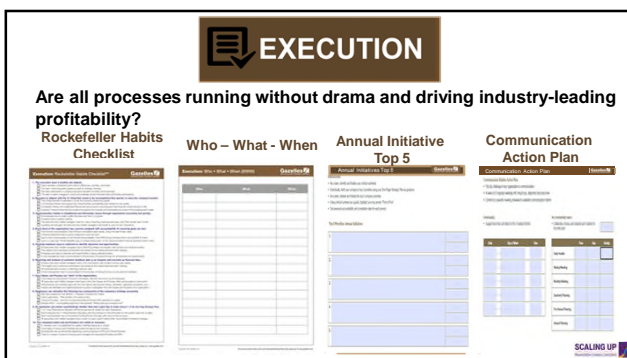
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✓ Read Book(s) and/or Workshop

✓ Initiate weekly council

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SCALING UP

Challenges of Scaling Up

SCALING UP

DECISIONS

SCALING UP

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The Council

pp 114 - 116

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Challenges of Scaling Up

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DECISIONS

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✓ Read Book(s) and/or Workshop

✓ Weekly “Council”

✓ Quarterly Theme (Main Thing)

✓ Daily Huddle

✓ Quarterly/Annual Offsite (Coach)

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Challenges of Scaling Up

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DECISIONS

SCALING UP

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SCALING UP MASTERY PROGRAM

Enabling Extraordinary Results

Distribute Learning and Application

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Mastering Scaling Up

- ✓ Bi-monthly sessions over a one year
- ✓ Facilitated by certified Scaling Up business advisors and coaches
- ✓ 5 – 8 companies working individually and collectively
- ✓ Distributed learning involving mixed media and peer exchanges
- ✓ Cost is less than 60% of the typical 1 on 1 approach
- ✓ Next session begins beginning of May running May 2020 to April 2021

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“On the plains of hesitation
lie the blackened bones...
...of countless millions who
at the dawn of victory...
...lay down to rest, and
in resting died.”

— Adlai Stevenson

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[illegible]

200

[illegible]

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Scaling Up Assessment

Cash Flow Story

Revenue is vanity. Profit is sanity.
CASH is KING!

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