

# 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, Recordkeeping

## 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!

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

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

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

- 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 (B/S), 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?

- 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

## 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?

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## 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	KPIs

**Brand Promise Guarantee (Catalytic Mechanism):**

**One-PHRASE Strategy (Key to Making Money):**

**Differentiating Activities (3 – 5 Hows):**

**X-Factor (10x – 100x Underlying Advantage):**

**Profit per X (Economic Engine):**

**BHAG\* (10 – 25 Year Goal):**

*\*BHAG is a Registered Trademark of Jim Collins and Jerry Porras*

# Strategy: One-Page Strategic Plan (OPSP)

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

## People (Reputation Drivers)

*Employees*

*Customers*

*Shareholders*

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

CORE VALUES/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> <tr><td colspan="2" style="text-align: center;"><b>Sandbox</b></td></tr> </table>	Future Date		Revenues		Profit		Mkt. Cap/Cash		<b>Sandbox</b>		<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**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Weaknesses:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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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. _____ |

CORE VALUES	PURPOSE	BRAND PROMISES
<div style="border: 1px solid #ccc; border-radius: 15px; padding: 10px; display: inline-block; background-color: white;"> <p style="color: red; font-weight: bold; font-size: 1.2em;">BHAG</p> </div>		
STRATEGIC		PRIORITIES
3-5 yr	1 yr	Qtr

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

**Your KPIs**

**Goal**

1		
2		
3		

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

- 
- 
- Between green & red*
- 

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

- 
- 
- Between green & red*
- 

**Your Quarterly Priorities**

**Due**

1		
2		
3		
4		
5		

*BHAG is a Registered Trademark of Jim Collins and Jerry Porras.*



## 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 responsible 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 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 the company's strategy accurately.

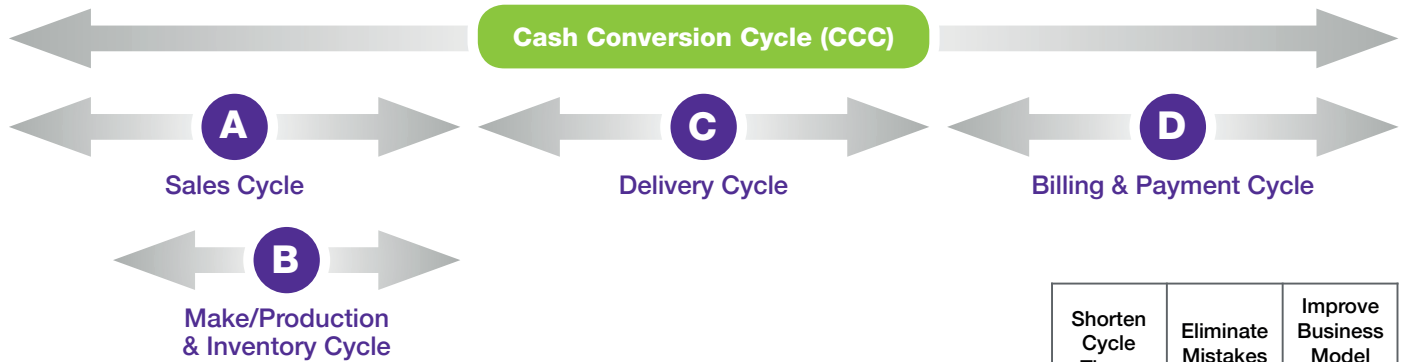
- Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.
- Core Customer(s) – Their profile in 25 words or less.
- 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.
- Elevator Pitch – A compelling response to the question "What does your company do?"

## 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

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**B** Ways to improve your Make/Production & Inventory Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**C** Ways to improve your Delivery Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**D** Ways to improve your Billing & Payment Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

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

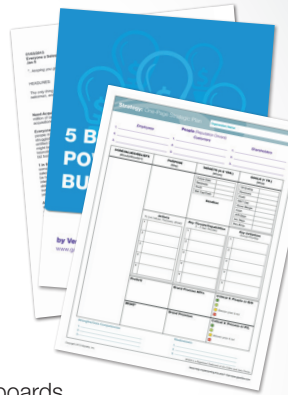
Your Power of One	Change you would like to make	Annual Impact on Cash Flow \$	Impact on EBIT \$
Price Increase %	%		
Volume Increase %	%		
COGS Reduction %	%		
Overheads Reduction %	%		
Reduction in Debtors Days	day(s)		
Reduction in Stock Days	day(s)		
Increase in Creditors Days	day(s)		

<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 SCALING 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.
3. Access, on [gazelles.com](http://gazelles.com), short **"Growth Guy"** articles offering practical tips on setting up advisory boards, daily huddles for sales people, and 75 other topics.



Go to [www.ScalingUp.com](http://www.ScalingUp.com)

**SCALING UP**  
A GAZELLES COMPANY



**Gazelles**  
COACHES

Our coaches use the **Scaling Up (Rockefeller Habits 2.0)** tools to help leadership teams align their decisions and actions around **People, Strategy, Execution and Cash**, based on proven best practices.

*"Recordsforce has been using Gazelles for a year and a half and we love it! It has made an amazing difference for me as CEO to have a real methodology for running my business."*

— Bill Becker, President

### PEOPLE

Become a magnet for A-players, increase accountability, and boost performance.

### STRATEGY

Align your values, be honest about your SWOTs, and develop a 3 to 5 year strategy to catapult growth.

### EXECUTION

Drive flawless execution into your organization and fine-tune processes to run without drama.

### CASH

Streamline cash flow to fuel growth and tighten your sales cycle to keep cash reserves healthy.

LET US CONNECT YOU WITH YOUR SCALING UP **CERTIFIED COACH!**

To get started, email us at: [support@ScalingUp.com](mailto:support@ScalingUp.com)

**SCALING UP**  
Rockefeller Habits Certified

## Want a Tool to Help Implement the Rockefeller Habits?

**align**

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- Run your Daily Huddle directly from the application
- See current and past One Page Plans as you update it for the future

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

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**GROWTH INSTITUTE**  
SCALE IMPACT & REDUCE DRAMA

**NOTES:**



**NOTES:**

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