Social Sector
GROWTHTOOLS™

One-Page Tools for Scaling-Up the Organization

People: One-Page Personal Plan (OPPP)
People: Function Accountability Chart (FACe)
People: Process Accountability Chart (PACe)

Strategy: Strengths, Weaknesses, Trends (SWT)
Strategy: 7 Strata
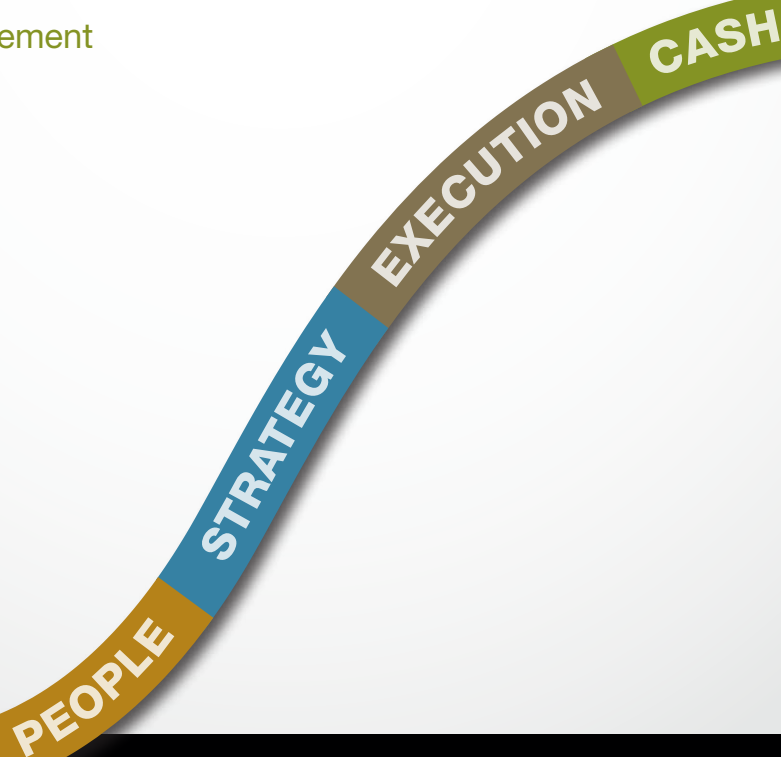**Strategy:** One-Page Strategic Plan (OPSP)
Strategy: Vision Summary

Execution: Who, What, When (WWW)
Execution: Rockefeller Habits Checklist™

Cash: Cash Flow Management
Cash: The Power of One

CASH

EXECUTION

STRATEGY

PEOPLE

Gazelles
GROWING LEADERS – GROWING COMPANIES

Gazelles 4D Framework
Getting to Impact

A proven discipline for excellence used by thousands of growing organizations to achieve ***IMPACT***.

1 ## Driver (with Accelerators)

Coaching – Advisors, Consultants, Coaches, Advocates
Learning – Not for Profit Development/Education
Technology – Management Accountability System

2 ## Demands (Balance)

People (Reputation) – Board/Staff/Volunteers, Beneficiaries, Funders/Stakeholders
Process (Productivity) – Programs, Funding, Operations

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 – Net Income/Time
Cash – Oxygen/Options/Sustainability

! ## Impact

Sustainability • Increased Net Income • Maximum Impact • 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 Income Statement, 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 Organization			
Human Resources			
Operations/Facilities			
Finance			
PR/Reputation Management			
Volunteer Recruiting/Coordination			
Information Technology			
Donor Relations/Development			
Stakeholder Relations			
Program Development/Mgmt.			
Beneficiary Advocacy			
Governance			
Risk Management/Compliance			
Department Heads • _____			
• _____			
• _____			
• _____			

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 organization.
2. Assign someone specific accountability for each process.
3. List Key Performance Indicators (KPIs) for each process (better, faster, efficient).

2 Person Accountable	**1** Name of Process	**3** KPIs (Better, Faster, Efficient)

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?

Strategy: 7 Strata

Organization Name:

Words You Own (Mindshare)

Sandbox and Brand Promises

Who/Where (Beneficiaries/Stakeholders)	What (Programs, Products & Services)	Brand Promises	KPIs

Brand Promise Guarantee (Catalytic Mechanism)

One-PHRASE Strategy (Key to Funding/Making Money)

Differentiating Activities (3-5 How's)

X-Factor (10x-100x Underlying Advantage)

Margin (Economic Engine)

BHAG® (10-25 Year Goal)

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1	
2	
3	
4	
5	

1	
2	
3	
4	
5	

1	
2	
3	
4	
5	

Between green and red

Between green and red

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

Deadline	
Measurable Target/Critical #	

Your KPIs		Goal
1		
2		
3		

		Who
1		
2		
3		
4		
5		

Describe and/or sketch your design in this space

Your Quarterly Priorities		Due
1		
2		
3		
4		
5		

🟩
🟩
🟨 *Between green and red*
🟥

🟩
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🟩
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🟥

🟩
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🟨 *Between green and red*
🟥

1. _____
2. _____
3. _____

4. _____
5. _____
6. _____

Core Values	Purpose	Brand Promises

BHAG®

STRATEGIC PRIORITIES

3-5 Years	1 Year	Quarter

YOUR NAME

Your KPIs		Goal
1		
2		
3		

Critical #: Operations

🟢
🟢
🟡 *Between green and red*
🔴

Critical #: Programs/Services

🟢
🟢
🟡 *Between green and red*
🔴

Your Quarterly Priorities		Due
1		
2		
3		
4		
5		

Gazelles
GROWING LEADERS – GROWING COMPANIES

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 organization forward.**
   - ☐ The Critical Number is identified to move the organization 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 organization 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 stakeholder feedback data is as frequent and accurate as financial data.**
   - ☐ All executives (and middle managers) have a 4Q conversation with at least one stakeholder weekly.
   - ☐ The insights from stakeholder conversations are shared at the weekly executive team meeting.
   - ☐ All employees are involved in collecting stakeholder data.
   - ☐ A mid-management team is responsible for the process of closing the loop on all stakeholder 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 organization's strategy accurately.**
   - ☐ Big Hairy Audacious Goal (BHAG®) — progress is tracked and visible.
   - ☐ Core Beneficiaries — 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 organization 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 organization'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 organization.
   - ☐ All executives and middle managers have a coach (or peer coach) holding them accountable to behavior changes.

10. **The organization'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 organization.
    - ☐ 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.

Cash Flow Management Cycle

A Donation/Funding/Revenue Cycle

C Program/Service Delivery Cycle

D Cash Flow Cycle

B Operations Cycle
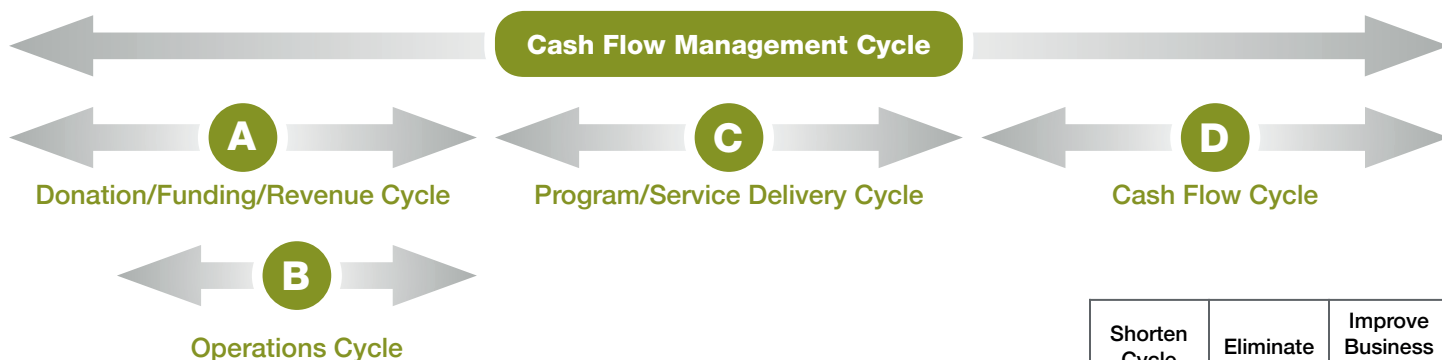
	Shorten Cycle Times	Eliminate Inefficiencies	Improve Business Model & P/L
A **Ways to improve your Donation/Funding/Revenue Cycle**			
1			
2			
3			
4			
5			
B **Ways to improve your Operations Cycle**			
1			
2			
3			
4			
5			
C **Ways to improve your Program/Service Delivery Cycle**			
1			
2			
3			
4			
5			
D **Ways to improve your Cash Flow Cycle**			
1			
2			
3			
4			
5			

Cash: The Power of One

Your Power of One	Net Income Flow $	Cash Reserves $
Your Current Position		

Your Power of One	Change you would like to make	Annual Impact on Cash Flow $	Impact on Cash Reserves $
Revenue Increase %	%		
Volume Increase % (Current Donor Base)	%		
Program Cost %	%		
Overhead %	%		
Reduction in Debtors Days	days		
Reduction in Stock Days	days		
Increase in Creditors Days	days		
Your Power of One Impact			

Your Power of One	Net Cash Flow $	Cash Reserves $
Your **Adjusted** Position		

NOTES:

If we can assist you with implementation
of the Rockefeller Habits™, Annual Planning,
or to build a One-Page Strategic Plan for
your organization, please contact us at
coaches@GICoaches.com