SCALING UP
GROWTH TOOLS™

ONE-PAGE TOOLS FOR SCALING UP THE BUSINESS

- **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
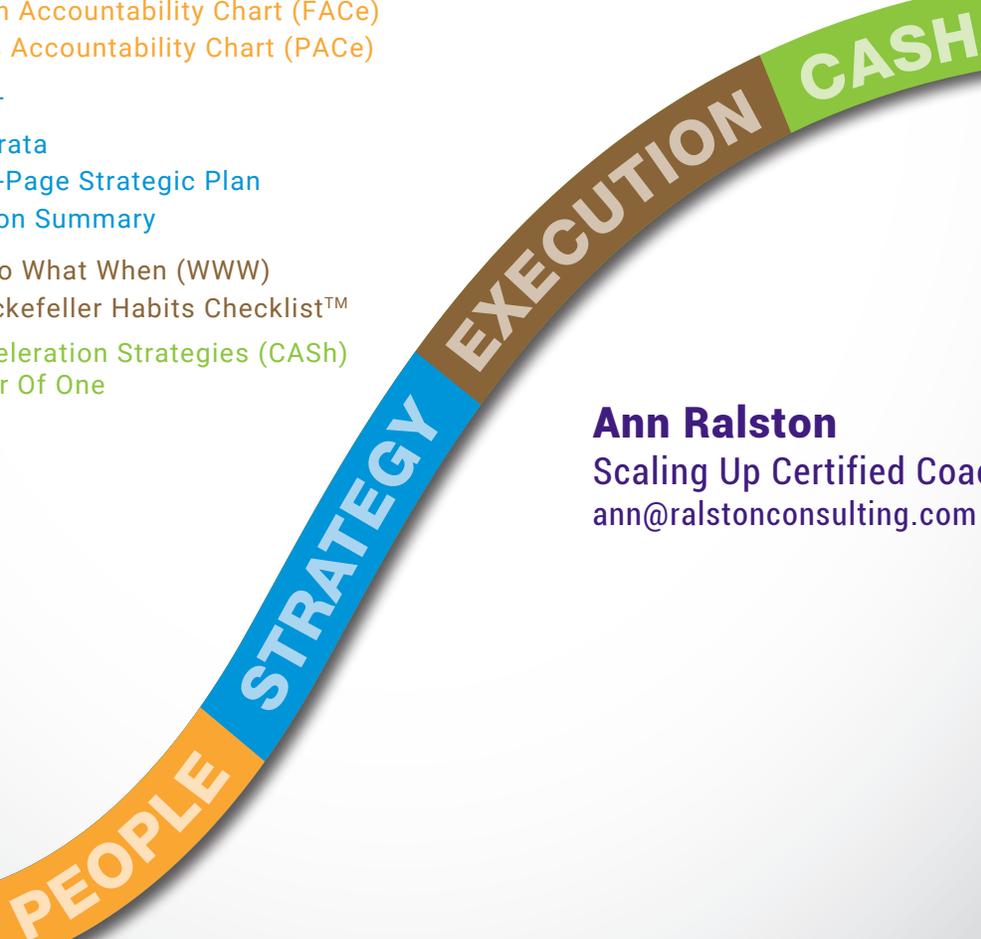
CASH
EXECUTION
STRATEGY
PEOPLE

Ann Ralston
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Scaling Up 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!

People: One-Page Personal Plan (OPPP)

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Name: _____

Date: _____

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

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People: Function Accountability Chart (FACe)

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?

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People: Process Accountability Chart (PACe)

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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

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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?

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Organization Name:

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):**

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Strategy: One-Page Strategic Plan (OPSP)

Organization Name: _____

People (Reputation Drivers)

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)

Sandbox

Actions *To Live Values, Purposes, BHAG*	**Key Thrusts/Capabilities** *3-5 Year Priorities*	**Key Initiatives** *1 Year Priorities*
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5

Profit per X	**Brand Promise KPIs**	**Critical #: People or B/S**
		◼ (dark green)
		◼ (light green)
		◻ *Between green & red*
		◼ (red)

BHAG®	**Brand Promises**	**Critical #: Process or P/L**
		◼ (dark green)
		◼ (light green)
		◻ *Between green & red*
		◼ (red)

Strengths/Core Competencies

1. _____
2. _____
3. _____

Weaknesses:

1. _____
2. _____
3. _____

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Your Name:	Date:

Process (Productivity Drivers)

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

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

Rocks
Quarterly Priorities — *Who*

1	
2	
3	
4	
5	

Theme Name

Scoreboard Design
Describe and/or sketch your design in this space

Your KPIs — *Goal*

1		
2		
3		

Your Quarterly Priorities — *Due*

1		
2		
3		
4		
5		

Critical #: People or B/S	**Celebration**	**Critical #: People or B/S**
■ 🟩 🟨 *Between green & red* 🟥		■ 🟩 🟨 *Between green & red* 🟥

Critical #: Process or P/L	**Reward**	**Critical #: Process or P/L**
■ 🟩 🟨 *Between green & red* 🟥		■ 🟩 🟨 *Between green & red* 🟥

Trends

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

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CORE VALUES	PURPOSE	BRAND PROMISES

BHAG

STRATEGIC		PRIORITIES
3–5 yr	**1 yr**	**Qtr**

Your Name: _____

Your KPIs		Goal
1		
2		
3		

Critical #: People or B/S

☐ (dark green)
☐ (green)
☐ *Between green & red* (yellow)
☐ (red)

Critical #: Process or P/L

☐ (dark green)
☐ (green)
☐ *Between green & red* (yellow)
☐ (red)

Your Quarterly Priorities		Due
1		
2		
3		
4		
5		

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Execution: Who • What • When (WWW)

Who	What	When

Execution: 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 o move the company ahead this quarter.
- ☐ 3-5 Priorities (Rocks) that support the Critical Number are identified and anked 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 qua ter 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 wo ds 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.

Cash: Cash Acceleration Strategies (CASh)

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Cash Conversion Cycle (CCC)

A Sales Cycle

B Make/Production & Inventory Cycle

C Delivery Cycle

D Billing & Payment Cycle
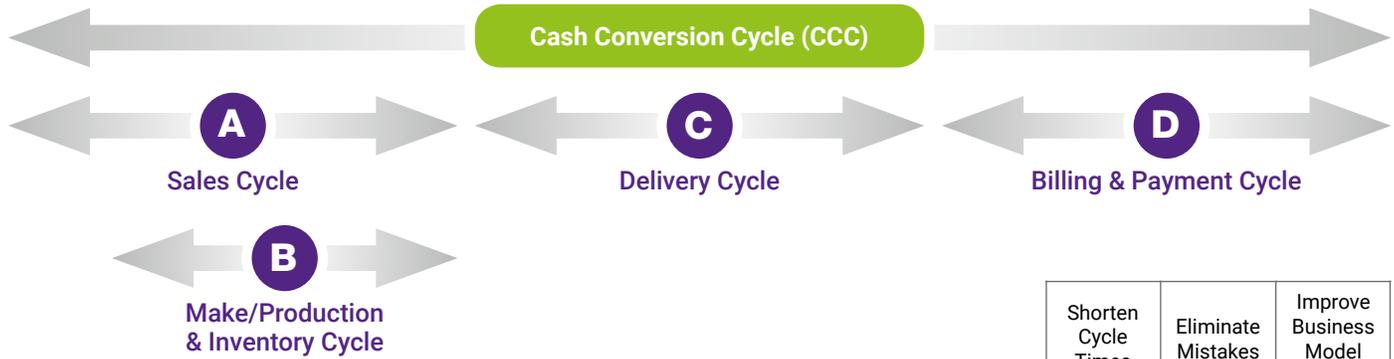
		Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
A	**Ways to improve your Sales Cycle**			
1				
2				
3				
4				
5				
B	**Ways to improve your Make/Production & Inventory Cycle**			
1				
2				
3				
4				
5				
C	**Ways to improve your Delivery Cycle**			
1				
2				
3				
4				
5				
D	**Ways to improve your Billing & Payment Cycle**			
1				
2				
3				
4				
5				

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Cash: The Power of One

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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)		
Your Power of One Impact			

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

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BONUS RESOURCES

PEOPLE RESOURCES

- ☐ *The 21 Irrefutable Laws of Leadership* / John C. Maxwell
- ☐ *The 5 Levels of Leadership: Proven Steps to Maximize Your Potential* / John C. Maxwell
- ☐ *The Coaching Habit: Say Less, Ask More & Change the Way* / Michael Bungay Stanier
- ☐ *Crucial Conversations* / Kerry Patterson, Al Switzler, Joseph Grenny, & Ron McMillan
- ☐ *The Culture Code: The Secrets of Highly Successful Groups* / Daniel Coyle
- ☐ *Delivering Happiness* / Tony Hsieh
- ☐ *Drive: The Surprising Truth About What Motivates Us* / Daniel H. Pink
- ☐ *Fierce Conversations* / Susan Scott
- ☐ *First, Break All the Rules* / Marcus Buckingham & Curt Coffman
- ☐ *The Five Dysfunctions of a Team: A Leadership Fable* / Patrick M. Lencioni
- ☐ *Go Put Your Strengths to Work* / Marcus Buckingham
- ☐ *The Ideal Team Player* / Patrick M. Lencioni
- ☐ *Leadership Challenge* / James Kouzes & Barry Posner
- ☐ *Multipliers* / Liz Wiseman
- ☐ *Now, Discover Your Strengths* / Marcus Buckingham & Donald O. Clifton
- ☐ *Our Iceberg Is Melting* / John Kotter & Holger Rathgeber
- ☐ *Oz Principles* / Roger Connor, Tom Smith, & Craig Hickman
- ☐ *The Power of Full Engagement* / Jim Loehr & Tony Schwartz
- ☐ *Powerful: Building a Culture of Freedom and Responsibility* / Patty McCord
- ☐ *Radical Candor* / Kim Scott
- ☐ *Strengths-Based Leadership* / Tom Rath & Barry Conchie
- ☐ *Topgrading* / Bradford D. Smart
- ☐ *Turn Your Ship Around* / David Marquet
- ☐ *What Got You Here Won't Get You There* / Marshall Goldsmith & Mark Reiter
- ☐ *Who: The A Method for Hiring* / Geoff Smart & Randy Street
- ☐ *The Work of Leaders* / Julie Straw, Mark Scullard, Susie Kukkonen, & Barry Davis

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STRATEGY RESOURCES

☐ *Abundance* / Peter Diamonds & Steven Kotler

☐ *The Advantage* / Patrick M. Lencioni

☐ *Blue Ocean Strategy* / W. Chan Kim & Renée Mauborgne

☐ *Blueprint to a Billion* / David G. Thomson

☐ *The Brand Promise* / Duane Knapp

☐ *Built to Last* / Jim Collins & Jerry I. Porras

☐ *Business Model Canvas* / Alex Osterwalder & Yves Pigneur

☐ *Catalytic Mechanism* / hbr.org/1999/07/turning-goals-into-results-the-power-of-catalytic-mechanisms

☐ *Competitive Advantage* / Michael E. Porter

☐ *Exponential Organizations* / Salim Ismail, Michael S. Malone, & Yuri Van Geest

☐ *Good to Great* / Jim Collins

☐ *Good to Great to Gone* / Alan Wurtzel

☐ *Great by Choice* / Jim Collins & Morten T. Hansen

☐ *Hidden Champion of the 20th Century* / Hermann Simon

☐ *How Companies Win* / Rick Kash & David Calhoun

☐ *How the Mighty Fall* / Jim Collins

☐ *The Inside Advantage* / Robert Bloom & Dave Conti

☐ *The Lords of Strategy* / Walter Kiechel

☐ *Outthink the Competition* / Kaihan Krippendorf

☐ *The Sales Playbook* / Jack Daly & Dan Larson

☐ *Start with Why* / Simon Sinek

☐ *Turning the Flywheel* / Jim Collins

☐ *The Ultimate Question* / Frederick F. Reichheld & Rob Markey

☐ *Uncommon Service* / Frances Frei & Anne Morriss

☐ *The Value Proposition* / Alexander Osterwalder, Yves Pigneur, & Gregory Bernarda

☐ *X-Factor* / hbr.org/2015/07/break-your-industrys-bottlenecks

EXECUTION RESOURCES

☐ *The 4 Disciplines of Execution* / Chris McChesney, Sean Covey, & Jim Huling

☐ *The 4 Hour Workweek* / Tim Ferriss

☐ *Balanced Scorecard* / Robert S. Kaplan & David P. Norton

☐ *Death by Meeting* / Patrick M. Lencioni

☐ *Execution Without the Drama* / Patrick Thean

☐ *Getting Things Done* / David Allen

☐ *The Goal* / Eliyahu M. Goldratt & Jeff Cox

☐ *Key Performance Indicators* / David Parmenter

☐ *Seven Habits of Highly Effective People* / Stephen Covey

☐ *Switch: How to Change Things When Change Is Hard* / Chip Heath & Dan Heath

CASH RESOURCES

☐ *The Automatic Customer* / John Warrilow

☐ *Built to Sell* / John Warrilow

☐ *Cash Flow Story* / cashflowstory.com

☐ *Confessions of a Pricing Man* / Hermann Simon

☐ *Financial Intelligence* / Karen Berman, Joe Knight & John Case

☐ *Great Game of Business* / Jack Stack & Bo Burlingham

☐ *Keys to the Vault* / Keith J. Cunningham

☐ *Profit First* / Mike Michalowicz

☐ *Simple Numbers, Straight Talk, Big Profits!* / Greg Crabtree & Beverly Harzog

☐ *A Stake in the Outcome* / Jack Stack & Bo Burlingham

☐ *Ultimate Blueprint* / Keith J. Cunningham

BONUS RESOURCES

- ☐ *Art of War* / Sun Tzu
- ☐ *Business Model Canvas* / strategyzer.com/canvas/business-model-canvas
- ☐ *CliftonStrengths (StrengthsFinder)* / gallupstrengthscenter.com
- ☐ *Driven* / David Kiley
- ☐ *HBR's 10 Must Reads on Strategy* / Harvard Business Review
- ☐ *The Ikea Edge* / Anders Dahlvig
- ☐ *The New Gold Standard* / Joseph Michelli
- ☐ *Nuts!* / Jackie Freiberg & Kevin Freiberg
- ☐ *Onward* / Howard Schultz
- ☐ *Steve Jobs* / Walter Isaacson
- ☐ *Titan* / Ron Chernow
- ☐ *Tools of Titans & Tribe of Mentors* / Tim Ferriss
- ☐ *The Virgin Way* / Richard Branson
- ☐ *Winning* / Jack Welch & Suzy Welch
- ☐ *Wooden on Leadership* / John Wooden & Steve Jamison
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