



# OneGOAL Strategic Plan

■ **PEOPLE: FUNCTION ACCOUNTABILITY CHART (FACE)**  
**PEOPLE: PROCESS ACCOUNTABILITY CHART (PACE)**

■ **STRATEGY: SWT**  
**STRATEGY: 7 STRATA**  
**STRATEGY: ONE-PAGE STRATEGIC PLAN (OPSP)**  
**STRATEGY: VISION SUMMARY**

■ **EXECUTION: WHO WHAT WHEN (WWW)**  
**EXECUTION: CHECKLIST**

■ **CASH: CASH ACCELERATION STRATEGIES (CASH)**  
**NOTE:**

Date of Version:







## 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?

**Business Department/Function.**

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**Strengths**

**Weaknesses**

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**Opportunities**

**Threats**

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**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):**

**Mission**

## 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)																														
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Strengths/Core Competencies

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

Weaknesses:

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

### 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. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

- Threats 1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

<b>CORE VALUES</b>	<b>PURPOSE</b>	<b>BRAND PROMISES</b>
	<div style="border: 1px solid #ccc; border-radius: 15px; padding: 10px; background-color: white; width: fit-content; margin: 0 auto;"> <b>MISSION</b> </div>	
<b>STRATEGIC</b>		<b>PRIORITIES</b>
<b>3-5 yr</b>	<b>1 yr</b>	<b>Qtr</b>

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		



## 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.

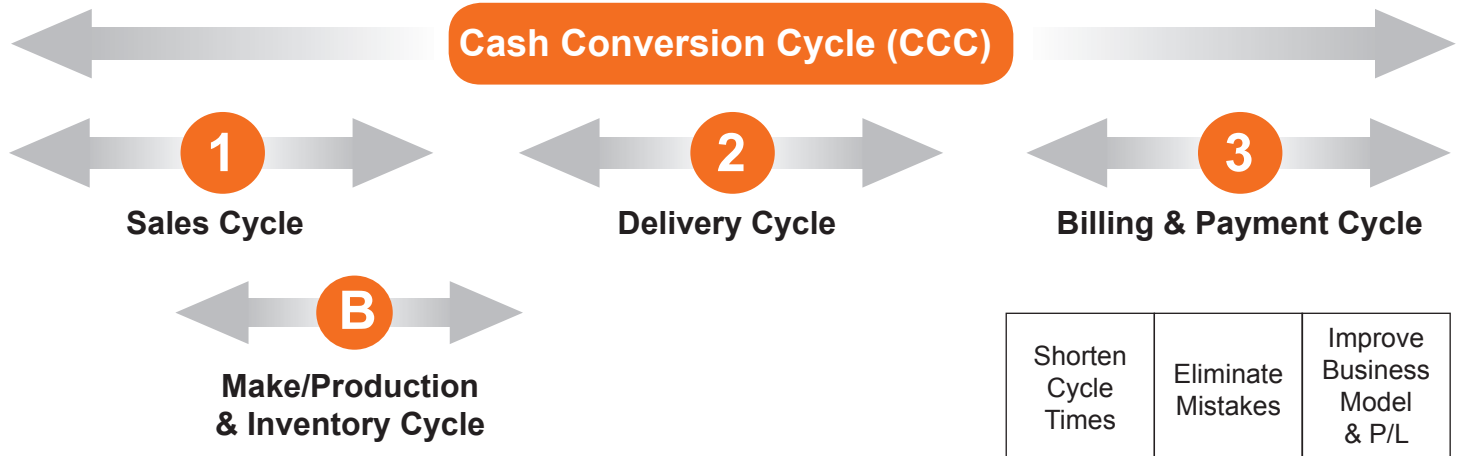
- Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.
- Core Customer(s) – Their profile in 25 words or less.
- 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.
- Elevator Pitch – A compelling response to the question "What does your company do?"

## 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			

**NOTE:**