



Scaling Up Your Business

Where is your road
map taking you?



Roadmap to Success

- Create shareholder value 5x or $\frac{1}{2}$ of 1 yr revenue
- Freedom and flexibility for Owner



Fly Wheel Effect



5 Step Management Process Plan

Complete
Diagnostic
Process

Create Strategy
Plan

Execute Road
Map

Communication
and Meeting
Rhythms

Learn, repeat,
iterate forward =
results



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6 Step Diagnostic Process

- Financial review
- Human Capital Review
- Operating model and metrics review
- Growth strategy and valuation discussion
- GAP analysis
- Priorities opportunities

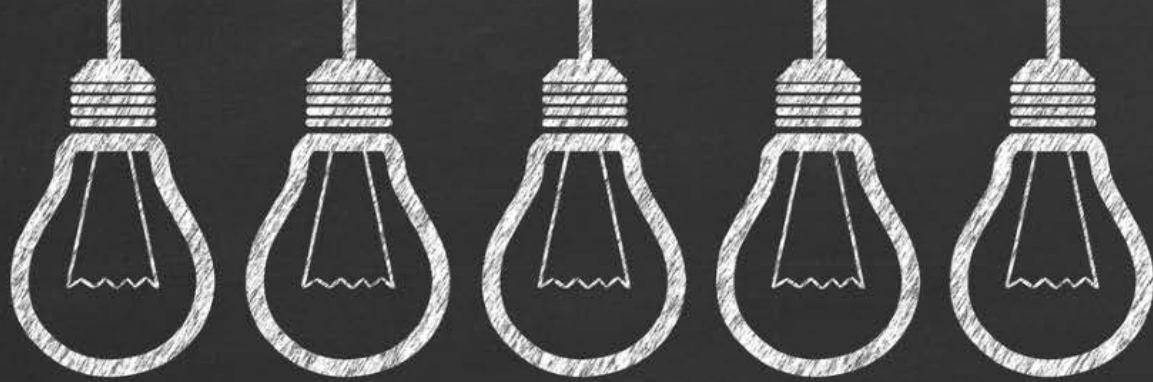
Strategy Plan

- Goals and timelines
- Mission and Vision
- Core values

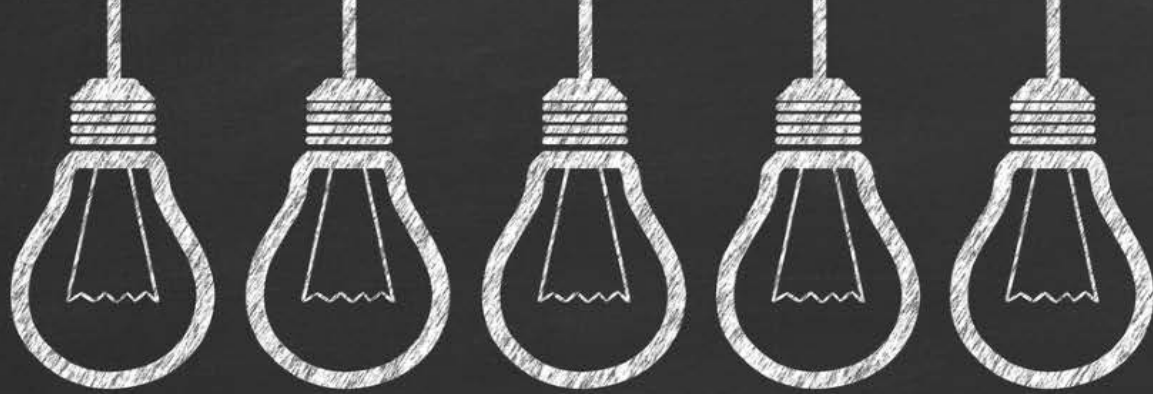


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- Market size and Competition Analysis
- Differentiation and Value Propositions
- Operating Model & Org Chart with roles and responsibilities



- Create a decision filter to guide decisions
- Budget
- Financial capital required
- Human capital required



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Execute Road Map

- Create Operating Model, Org Chart, Roles and Responsibilities, KPI's, and Metrics by position
- Talent plan – On Boarding, Accountability, Incentives, Tools needed



Communication & Meeting Elements

- 3 key quarterly goals
- Choke point plans and discussion – what are they, how to control and overcome?
- Financial – P and L, Balance sheet, AR and Cash flow

Communication & Meeting Elements

- Mastering your Brand Promise/Differentiation
- Company Culture – motivate and keep fun
- Market Dynamics External – BLS , competition, ASA , SIA others
- Accountability Tracker is developed and used

Meeting Agenda Examples

Daily Huddle AGENDA – Alignment (10-15 Minutes)

- Daily Metrics (with colors vs. Goal and Prior time period)
- Good News or Problems from the prior day
- Is anyone "stuck"

Weekly Team Meeting AGENDA – Priorities/Debate (1-2 hours)

- Good News – 5 min.
- ScoreBoard (Priorities) & Numbers – 15 Min.
 - Should be SHORT (preferably no "updates")
 - Mention – Is anything keeping you up at night?
- Customer/Employee Data – 10 min.
- Collective Intelligence – 30 minutes
 - What do we need to figure out today
- Who/What/When Summary
- 1 Big Takeaway

Monthly Meeting AGENDA - Big Issues (2-4 hours)

- Direction
 - Review Progress on Quarterly Top 3 Priorities and KPI's
 - Adjustments Needed
- Strategic Opportunities
- Team Update

Quarterly Meeting Agenda



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Short Term Outcomes to Iterate Forward

- ✓ Daily, Weekly, Monthly, Quarterly and Annual meeting results
- ✓ 3 key quarterly goals achieved
- ✓ Quarterly Financial results



Long Term Outcomes

✓ BHAG

✓ Choke point plans and discussion

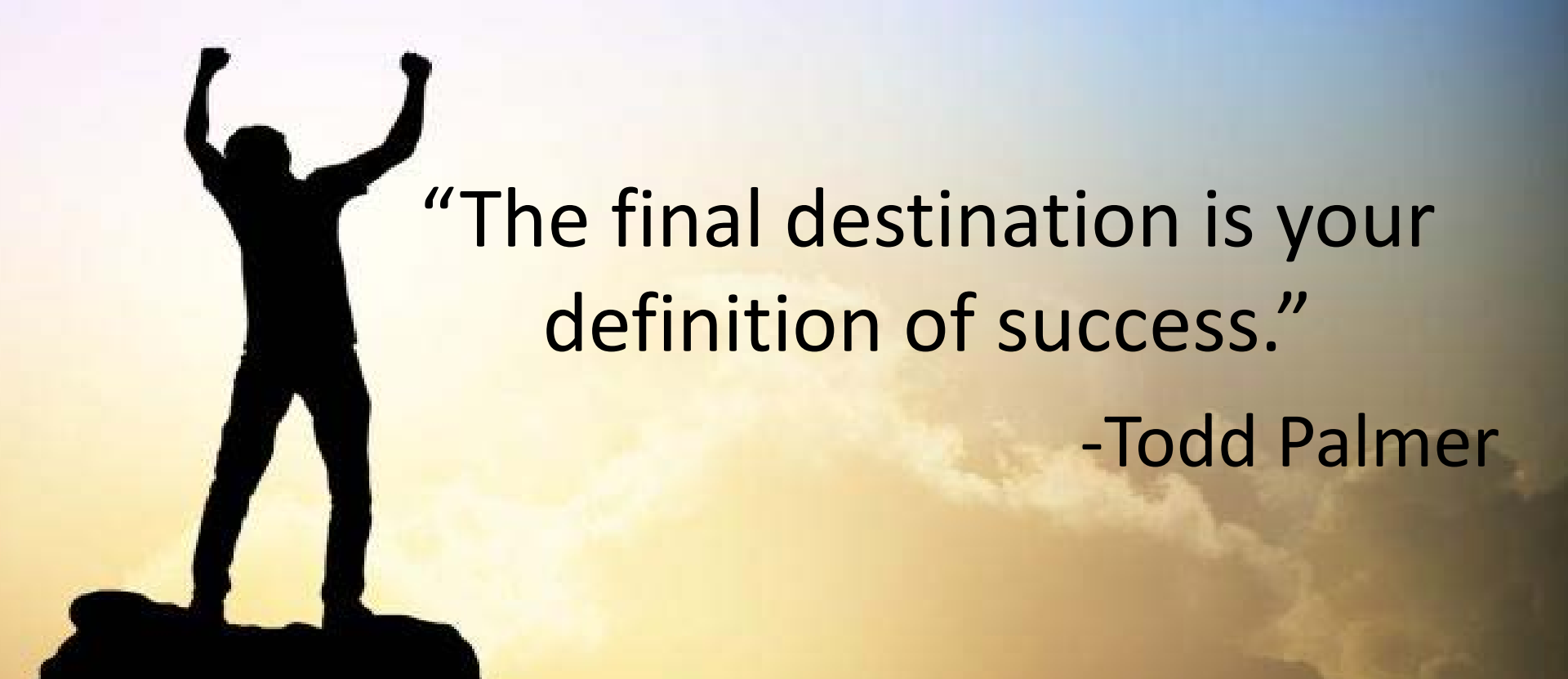
– what are they, how to control, overcome?

✓ Financial

✓ Value created



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“The final destination is your
definition of success.”

-Todd Palmer



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