Date: Organization Name:

## Reputation (Get/Keep/Grow)

## Customers

Key Question: What 1-3 metrics indicate relationship health in those who pay us (e.g., NPS, LCV. etc.)?

### **Employees**

Key Question: What 1-3 metrics indicate relationship health in those we pay (e.g., eNPS, engagement scores, retention rates, etc.)?

#### Shareholders

Key Question: What 1-3 metrics indicate relationship health in our investors and partners (e.g., valuation, distributions, etc.?)

3 yr. (Where?)

## Sell

Key Question: What 1-3 metrics indicate productivity in our sales process (e.g., close ratios, sales cycle, etc.)?

## Buy/Make/Deliver

1 yr. (What?)

Key Question: What 1-3 metrics indicate productivity in our operations process (e.g., gross margin, quality measurements, speed, etc.)?

Productivity (Better/Faster/Cheaper)

## **Administrative**

Key Question: What 1-3 metrics indicate productivity in our admin processes (e.g., relevance, speed, data accuracy, etc.)?

**(6)** 

## Foundation, Core & 10+ yr. (Why?) Ultimate Aspirations

Key Question: What are the financial results we seek, the difference we want to make, and the legacy we intend to

## Core Focus (Hedgehog)

Key Question: What CAN and CAN'T we be the best in the world at? What drives our economic engine? What are we most passionate about?

## Metric Targets

Key Question: What are the key financial and nonfinancial metrics targets we aim for in 3 years?

## **Metric Targets**

Key Question: What are the key financial and nonfinancial metrics targets we will reach this year?

## **Metric Targets**

Key Question: What are the key financial and nonfinancial metrics targets we must hit this quarter, including specific drivers contributing to our Critical Number focus?

Qtr. (How, Who & by When?)

### Core Values

Key Question: What are the common, acceptable behaviors of our team?

### Sandbox

Key Question: Where do we play?

- Geography
- Vertical
- Segment

#### Marketplace Attributes Key Question: What are the attributes of our

marketplace?

## **Key Initiatives**

Key Question: What are the top 5 goals we plan to accomplish this year, the #1 of those five?

## **Company Priorities**

Key Question: What are the 3-5 most important priorities we must achieve success on this quarter, and what is priority #1 of those 3-5?

### **Core Customer**

Key Question: Who is the individual most likely to buy our product/service in the quantity necessary for us to optimize our profitability?

## Differentiating Activities

Key Question: What is the set of 3-5 differentiating activities that give us a unique and valuable position in our marketplace?

## Critical Number(s)

Key Question: What is the most important financial or operational constraint we must address over the next 12-18

## Right Drivers

Key Question: What are the 2-5 specific drivers contributing to the success of our Critical Number in the next 90 days - in addition to our regularly forecasted metrics?

## Value Proposition & Brand Promise(s)

Key Question: What are our Core Customer's jobs to be done. and what unique brand promise(s), associated KPI(s), and guarantee do we make to ensure these jobs get done?

## **Key Capabilities**

Key Question: What are the 3-5 capabilities we need to develop?

## Contingencies

Key Question: What pre-vetted contingencies could

we pull off the shelf and activate within 6-12 months if needed?

# Flywheel

Key Question: What are the 4-6 replicable successes that, when energy is applied to any part, cause our organization to build momentum?

## One Phrase & X-Factor

Key Question: What is our simple strategy statement?

Key Question: What is the key constraint in our market category that we solve, giving us a 10-100X advantage? (Once known,

Key Question: What will our company BE at the end

### QHAG / Theme

Key Question: What is our theme tied to our #1 thing for the quarter?

## Core Purpose

Key Question: What is our company's reason for existence beyond profit?

BHAG

Key Question: What will our company BE in 10-30 years?

3HAG

Key Question: What will our company BE in 3 years?

1HAG

of this year?



#### Dynamic S.W.O.T. Analysis

### Strengths (Core Competencies)

Key Question: What are the key strengths that represent our core competencies?

### Weaknesses (Inherent Limitations)

Key Question: What are the inherent weaknesses and limitations we are unlikely to eliminate?

## Opportunities (Potential Contingencies)

Key Question: What opportunities could we vet to become contingencies for our



#### Threats & Trends

Key Question: What threats and trends must we be aware of, good or

