



STRATEGIC DESIGN: *Part 1*

NAME _____

CONTACT _____

DATE _____

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TRANSFORMATION

SUCCESS STARTS WITH UNDERSTANDING
YOUR PRESENT AND DESIGNING
YOUR FUTURE.

INTRODUCTION

Strategic Design is the process by which executive teams learn from their past, envision their future, and turn that future into a series of actionable steps. It's composed of nine steps, which will be covered over two intensives.

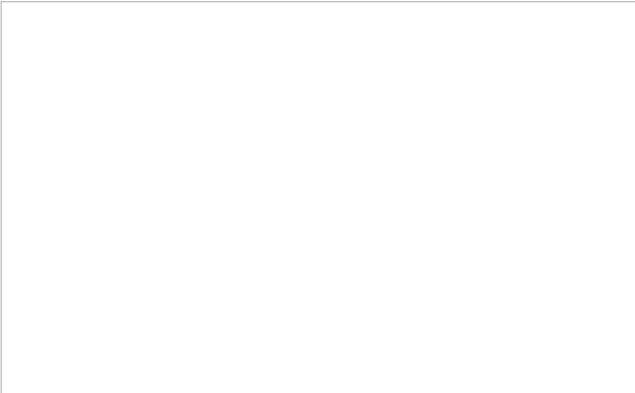
Strategic Design: Part I covers steps 1–3.
 Strategic Design: Part II covers steps 4–9.

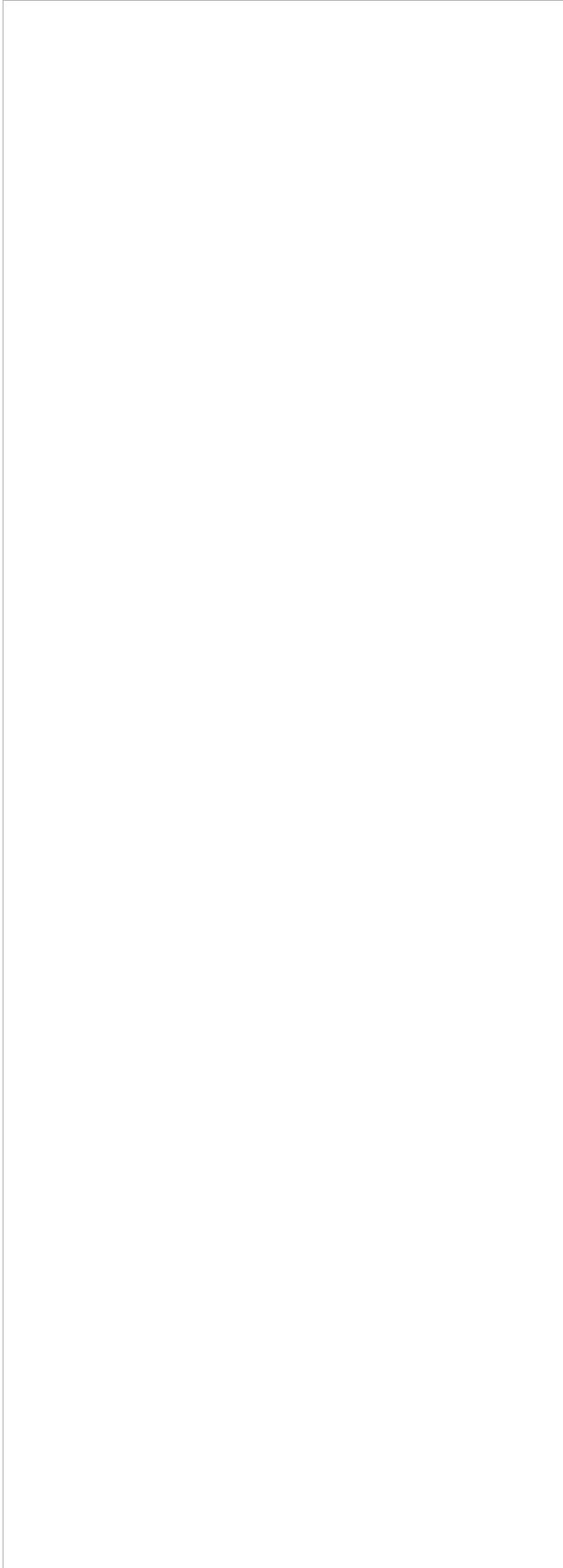


STEP 1 Establish Strategic Context	STEP 2 Evaluate the Past	STEP 3 Envision the Future	STEP 4 Define Departmental Contributions	STEP 5 Set Initiatives and Goals	STEP 6 Create Project Plans	STEP 7 Build Operations Plan	STEP 8 Share With Your Organization	STEP 9 Maintain Your Alignment
BUSINESS ACCELERATOR INTENSIVE Strategic Design: Part I			BUSINESS ACCELERATOR INTENSIVE Strategic Design: Part II					

STEP 1: ESTABLISH STRATEGIC CONTEXT

Gather your financial data, conduct an employee survey, assess last year's goal progress, revisit your mission and values, and begin to capture your current reality.





**STEP 2:
EVALUATE THE PAST**

Evaluate your financial data, employee survey results, and key initiatives and goals to distill past experiences into lessons for the future.

**STEP 3: ENVISION THE
FUTURE**

Reaffirm your company mission and goals, finalize your current reality, and envision your future reality. The result will be a completed Vision Script.

**STEP 4: DEFINE
DEPARTMENTAL
CONTRIBUTIONS**

Each member of the executive team completes a Departmental Contribution form. After being completed independently, these forms will be shared and discussed.

**STEP 5: SET INITIATIVES
AND GOALS**

Identify four company initiatives and break each initiative down into SMARTER goals. Define a vision using the Vision Caster for each initiative and goal to streamline delegation.

STEP 6: CREATE PROJECT PLANS

Major projects are identified within goals and broken down into minor and individual projects. These projects are sequenced, assigned, and reconciled among departments.

STEP 7: BUILD OPERATIONS PLAN

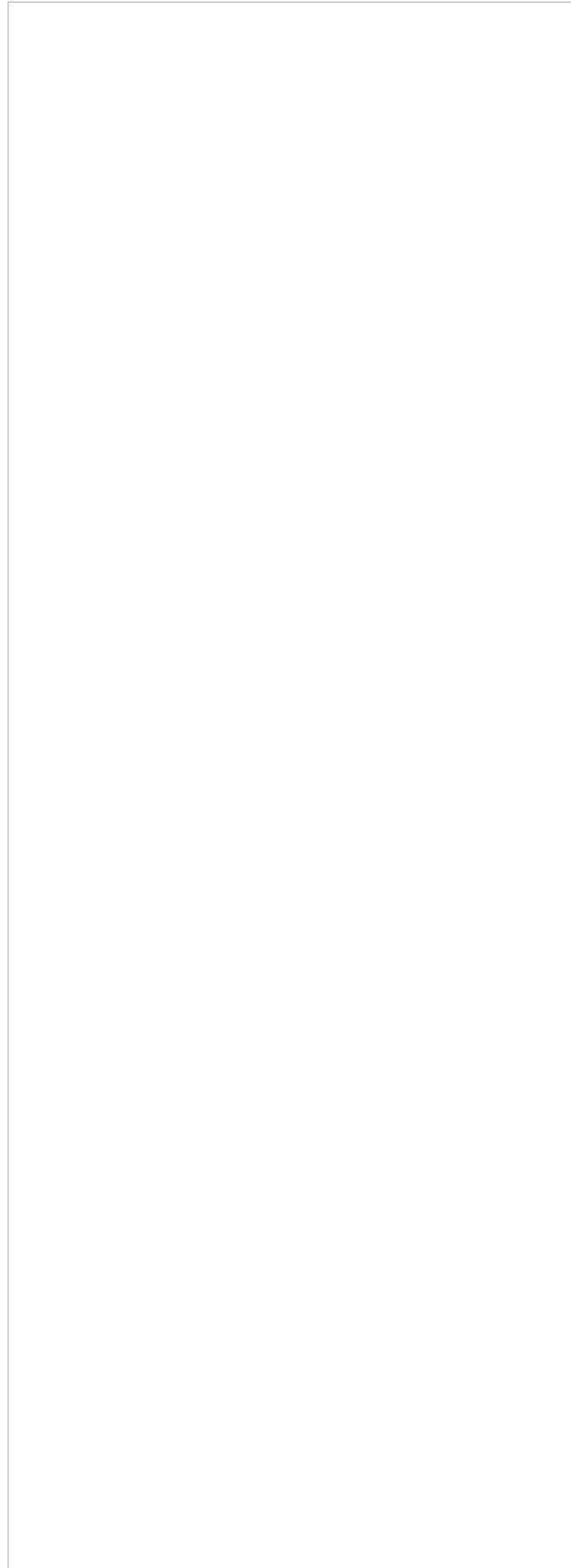
Build your annual budget, staffing plans, and company calendar. These processes will be completed with your Vision Script, initiatives, and goals in mind.

STEP 8: SHARE WITH YOUR ORGANIZATION

Align your team by holding an annual meeting composed of two parts. The first all-team portion includes the presentation of initiatives and the rationale behind them. In the second portion, individual departments walk through goals and their resulting project plans.

STEP 9: MAINTAIN YOUR ALIGNMENT

Keep project, goal, and initiative progress visible through a series of weekly, monthly, and quarterly meetings.





Throughout this process, you'll never be working alone. Your executive team will join you for steps 1–5. Your leadership team and project managers will take the lead in step 6. And your leadership team and operations team will partner with you in steps 7–9.

CONCLUSION

By the end of the Strategic Design process, your clear, inspiring, and actionable strategic plan will be actively shaping each part of your business. We'll get there one step at a time. First, let's consider your part to play.

BEFORE YOU BEGIN: EMBRACE YOUR ROLES IN STRATEGIC DESIGN

INTRODUCTION

Our lives require us to play many roles. We're leaders, coworkers, friends, parents, spouses, siblings. Intuitively, we adapt our behavior to fulfill the requirements of each role. We lean into different parts of who we are to best serve each situation.

To walk through the Strategic Design process requires a similar shuffling of parts. You might find that each of these three roles plays unequally to your strengths—that one comes naturally while another feels especially challenging. It's essential to embrace where you have room to grow, leaning on the strengths of others while stepping into the freedom of being in this process.

The nine-step Strategic Design process entails fulfilling three roles.



ROLE 1: DETECTIVE

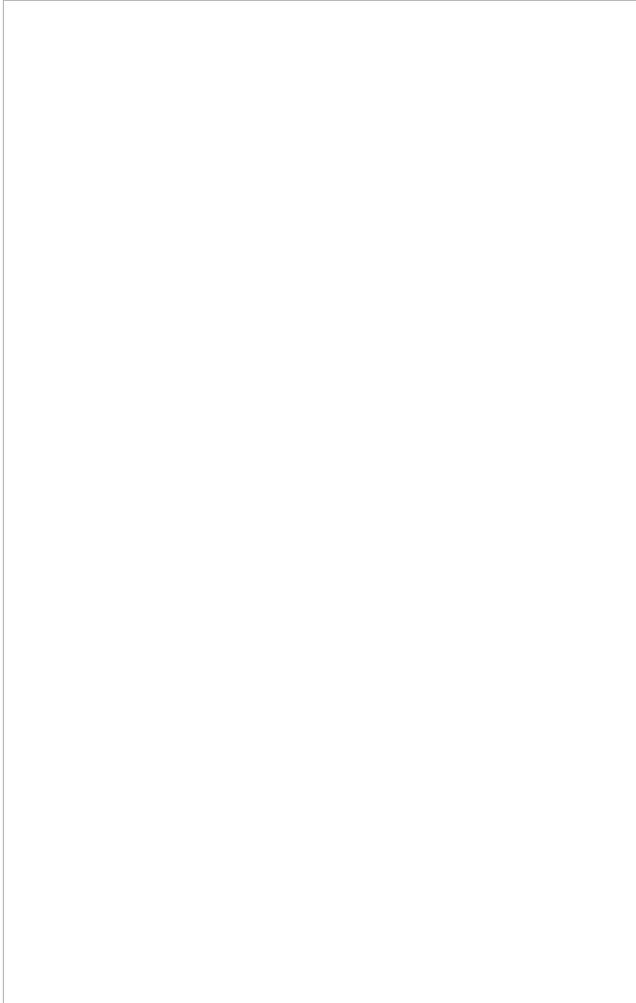
Detectives turn clues—data—into coherent stories about what happened, why, and what to do about it.

ROLE 2: DREAMER

Dreamers envision a better future.

ROLE 3: DEFINER

Definers design methods for turning imagined futures into concrete realities.



ROLE 1: DETECTIVE

STEP 1-2

Humans make sense of their experiences through the lens of story. Put differently, we're narrative creatures.

You have a story about your company. What is the state of your company? What are your greatest threats? How would you describe the culture of your team? The answers to these questions reveal the stories you believe.

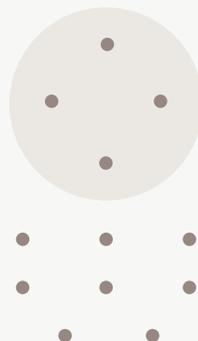
The question isn't whether you've created a story, but how well-founded the story actually is.

The best stories are well informed. They account for as much data as possible. In other words, Story 1, which includes more data points, is an objectively more reliable story than Story 2.

STORY 1



STORY 2



Telling better stories requires taking a close look at the data. That's why in **Step 1: Establish Strategic Context**, you'll gather the facts. And in **Step 2: Evaluate the Past**, you'll start turning those clues into coherent, reliable stories.

ROLE 2: DREAMER

STEP 3

Dreamers imagine what could be. They challenge our preconceived notions.

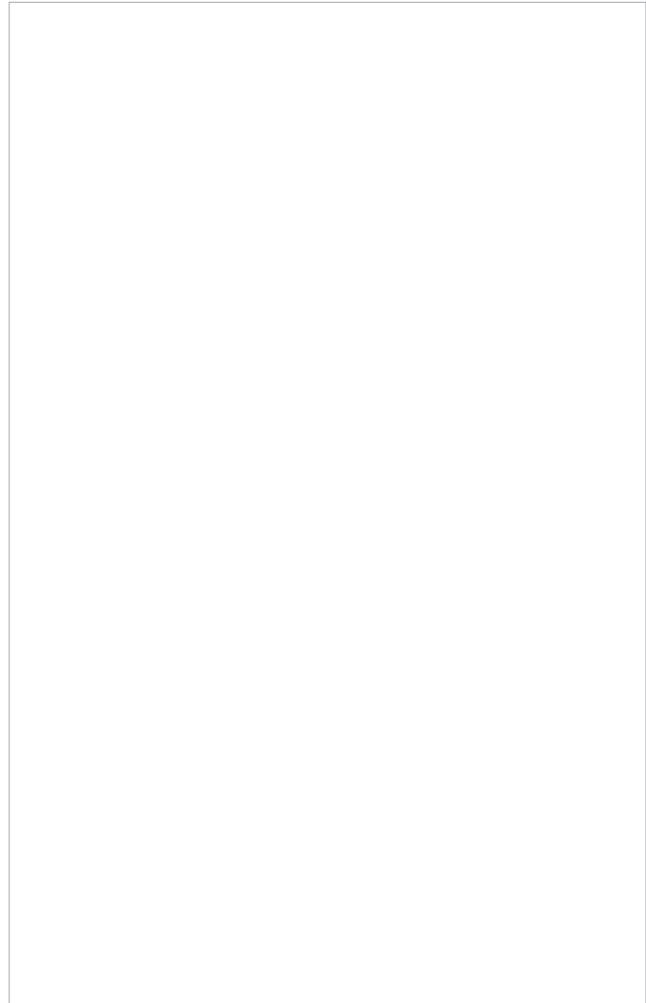
They're industry disruptors. They redefine what's possible.

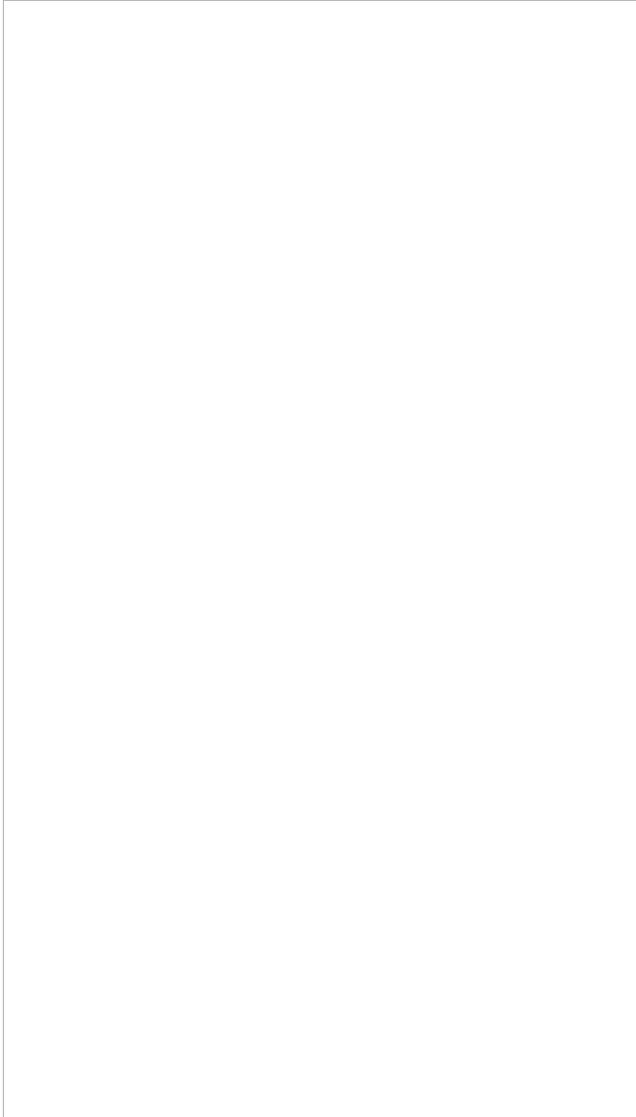
Dreamers are experts at waiting to ask "How?" They know that starting to strategize too quickly undermines dreaming. They err on the side of dreaming too big—knowing it's easier to reign in a dream than to make it grow.

This role is essential in **Step 2: Envision the Future.**

ROLE 3: DEFINER STEPS 4-9

A vision is only effective when put into action. This process begins by breaking a vision down into increasingly smaller steps. The process of implementing your vision looks something like this:





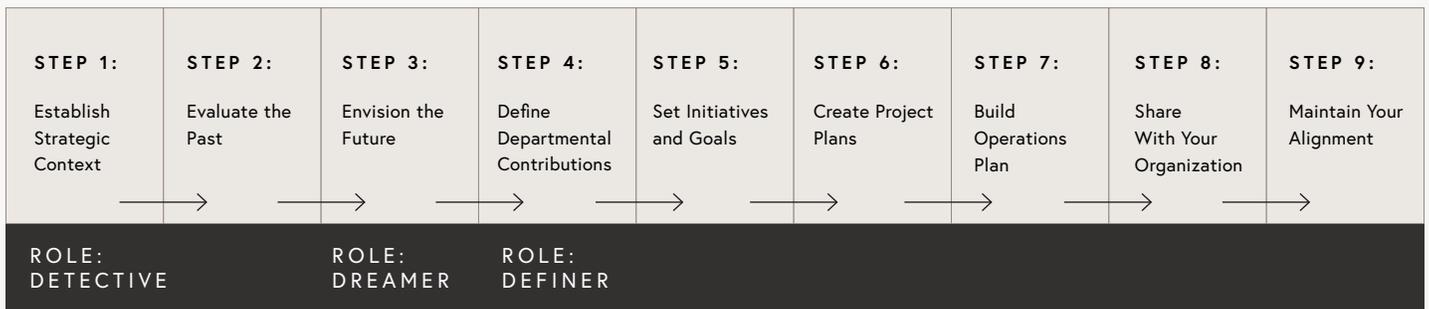
You'll guide your team to start breaking your vision down into these increasingly smaller pieces in the final steps of the Strategic Design process.

For today, you'll be a *detective* and a *dreamer* as we walk through steps 1–3 of the Strategic Design process.

CONCLUSION

Over the course of the Strategic Design process, you'll fill three different and crucial roles. As a detective, you'll lead your team to collect and analyze the facts. As a dreamer, you'll empower them to help you envision a better reality. As a definer, you'll begin turning this vision into smaller, actionable steps.

By the end, your high-level vision will directly translate to the daily actions of your team.



EXERCISE:

WHY IS THIS IMPORTANT?

How will going through this Strategic Design process be different from what you've done in the past?

What will walking through Strategic Design allow you to accomplish?

What's at stake if you fail to design your future?

EXERCISE: WHY IS THIS IMPORTANT?

SAMPLE

How will going through this Strategic Design process be different from what you've done in the past?

In the past, our process for planning for the future has been disconnected from reflecting on the past. We've also had longer lists of company goals assigned to individuals, rather than a few initiatives into which those goals are organized.

What will walking through Strategic Design allow you to accomplish?

We'll be able to actually achieve the future we imagine by connecting that vision to the daily actions of each person on our team. Everyone will be on the same page about what matters, and why. This alignment will transform our ability to collaborate and help improve our results.

What's at stake if you fail to design your future?

If we don't design the future, it will happen to us. We'll be constantly reacting to the marketplace, to our competitors, to the environment. Living in reaction mode will hurt our decision-making and lead to burnout for our team—especially our leaders.

STEP 1: ESTABLISH STRATEGIC CONTEXT

INTRODUCTION

Skilled detectives begin by gathering clues. In **Step 1: Establish Strategic Context**, you'll imitate these experts. You'll pull together the information you'll need access to before diving in. This process is divided into five tasks.

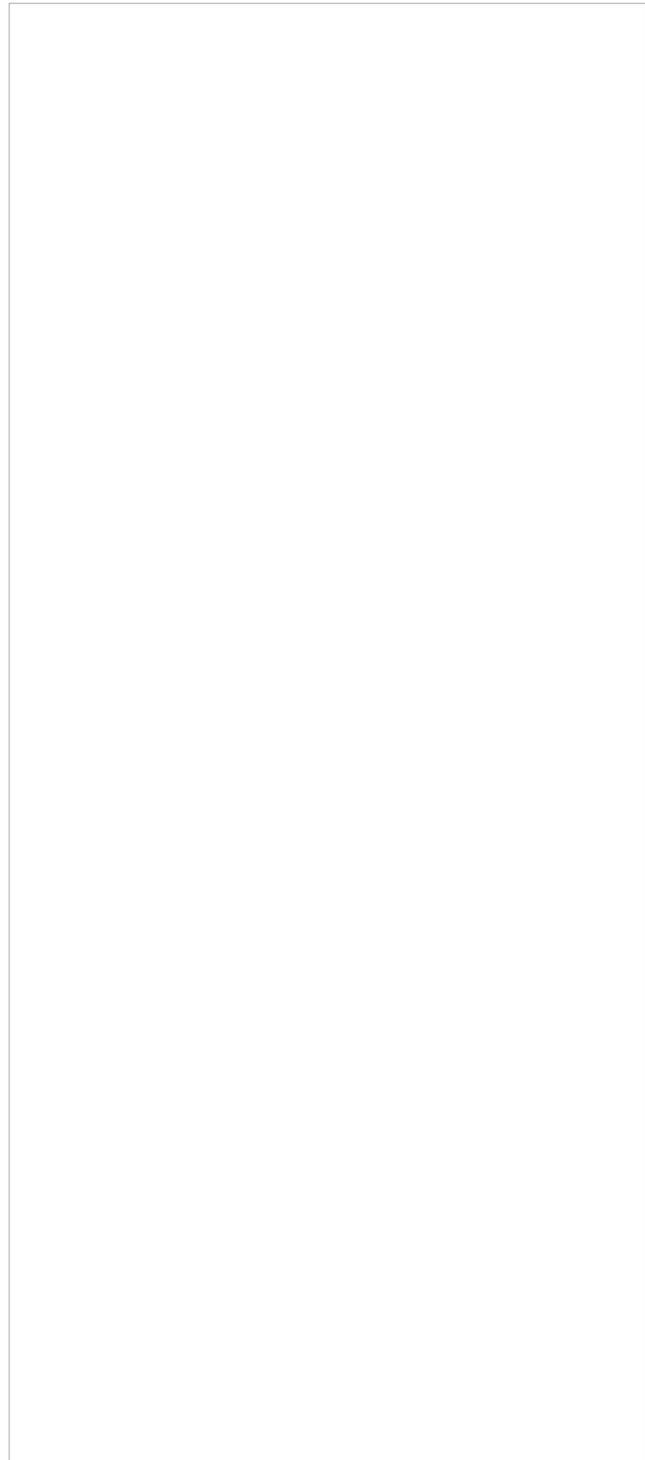
TASK 1: GATHER FINANCIAL DATA

Insight into your financials is essential for assessing the state of your company and calibrating your future trajectory. Task the finance team with gathering key financial data from up to the past five years.

Your CFO should have insight into the specific metrics and key data most helpful to your company. If needed, you can find a list of ideas to get you started on page 51.

TASK 2: COMPILE EMPLOYEE SURVEY RESULTS

Your employees are some of the best people to turn to for insight into your company. Their experience of your day-to-day operations and culture give them





an up-close understanding of where your company is thriving—and where it needs growth.

The best way to mine these insights is by conducting a company-wide survey. For your convenience, we've supplied a sample survey you can adapt for your company on page 53.

Your survey will receive more widespread participation if:

- You indicate that responses will be taken into account as you plan for the future.
- The request includes a clear estimate of how much time will be necessary for completion.
- The survey is sent at least two weeks before the deadline of its completion.
- Employees receive friendly reminders leading up to the deadline.

Once the results have come in, they should be compiled and distilled to identify patterns, shared insights, and significant individual responses. Typically, the human resources or administrative team facilitates this work.

TASK 3: CAPTURE KEY INITIATIVE AND GOAL UPDATES

Even if you haven't set initiatives and goals structured in the way we introduce during the strategic planning process, you likely have benchmarks

you intended to reach during the past twelve months—maybe you called them milestones, goals, strategic priorities, or accountabilities.

List these in the Goal Status Report on page 57. Then, in the same document, provide an update on your progress where indicated. This form will act as an at-a-glance update to walk through in the next step of the Strategic Design process.

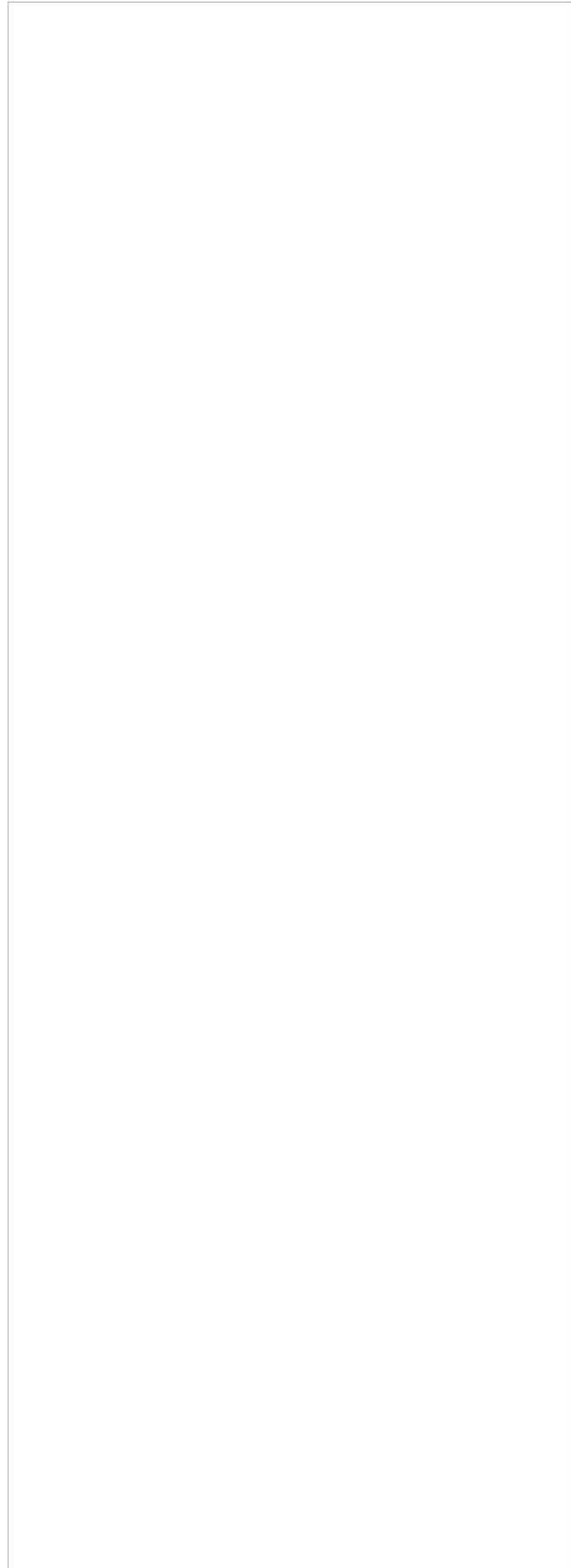
TASK 4: REVISIT MISSION AND VALUES

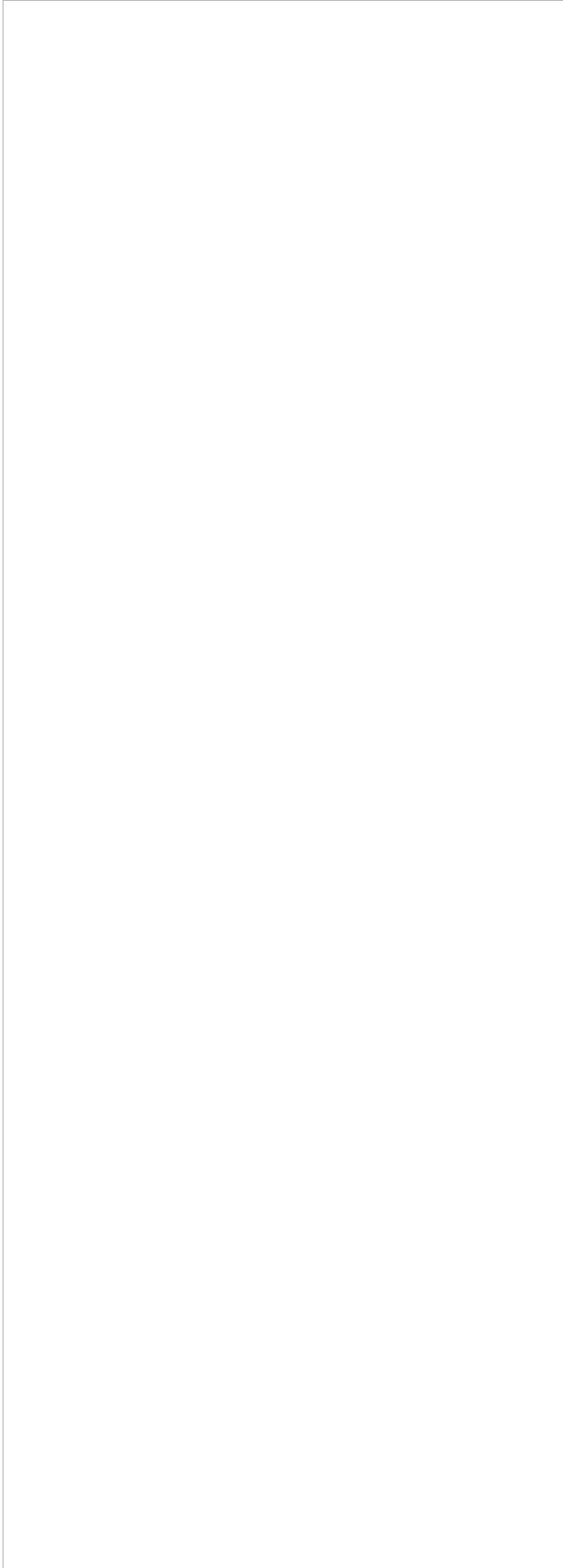
Next, you'll revisit who you are—your mission and values. While these should remain relatively consistent year over year, you may decide that you want to make a few adjustments.

To simplify this process, we've provided a series of tools on pages 59–70. Once complete, your revised mission and values will ground your company as you move forward into the coming year.

TASK 5: CAPTURE YOUR CURRENT REALITY

Finally, you'll take stock of your Current Reality. This Current Reality should take the form of the sample shown on pages 71–72.





Your Product Details pages will capture the products, programs, and services you offer your customers. For each product, program, or service, you will include:

- A succinct **description** of what the product is
- A rationale for **why you're excited** to offer it
- Key information about **the customer** purchasing the product
- The **scope** of the products' usage
- The **revenue** in dollars
- And the **profit** both in dollars and in the percentage of company profit.

Your Stakeholder Status page will list key stakeholders such as employees, contractors, board members, and more. For each stakeholder, you will include:

- **Why you're excited** about each stakeholder
- The **number** you have
- Key **demographic** information
- And, for your employees, **popular benefits**

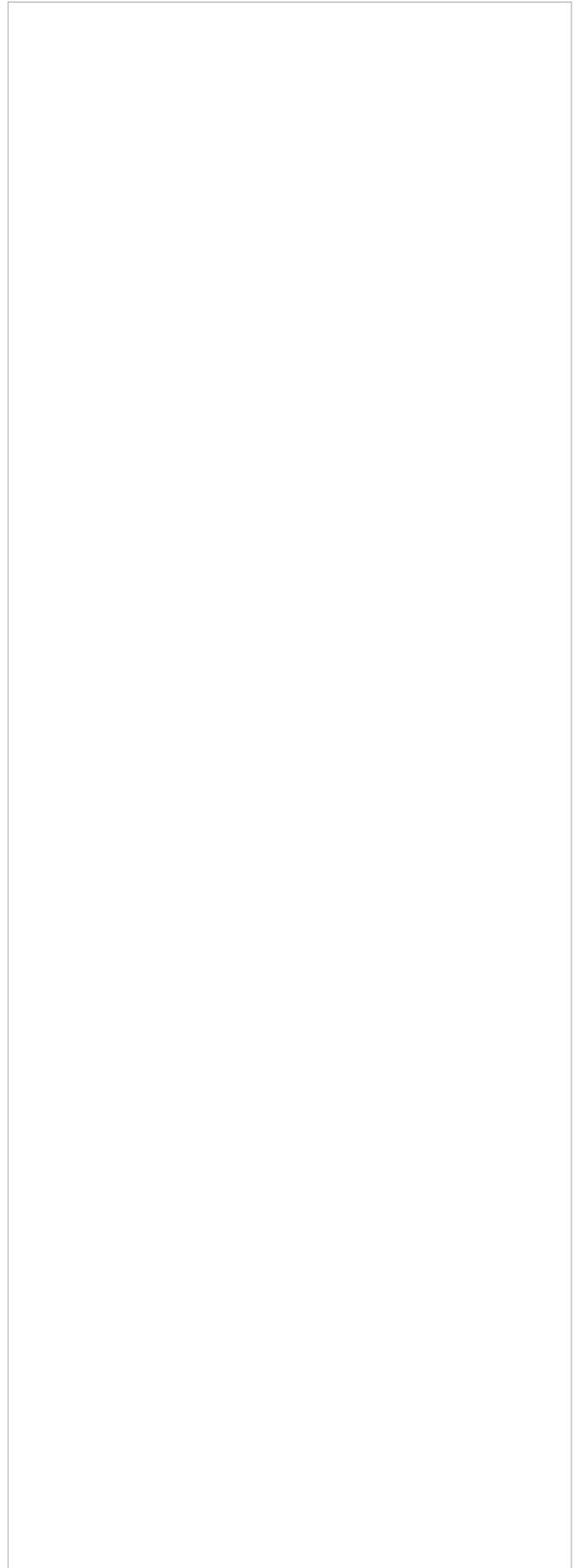
The person with the easiest access to the necessary information should be tasked with providing the corresponding updates.

If you're unable to gather this information in its entirety, do the best you can. You'll have more insight into the current state of your company following **Step 2: Evaluate the Past.**

CONCLUSION

Good work often requires thorough preparation. Once you've gathered financial data, compiled employee survey results, captured key initiative and goal updates, revisited your mission and values, and begun to capture your current reality, you've completed **Step 1: Establish Strategic Context.**

This work will equip you to put your discoveries to work in **Step 2: Evaluate the Past.** Now, turn to the exercise on the following page to begin delegating these tasks.





EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. I)

STEP 1: ESTABLISH STRATEGIC CONTEXT		
TASK 1: Gather Financial Data	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 2: Compile Employee Survey Results	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 3: Capture Key Initiative and Goal Updates	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 4: Revisit Mission and Values	Who will join you in this meeting?	
	When will you meet?	
	Who will be responsible for preparing the final document?	
	By when will the document be complete?	
TASK 5: Capture Current Reality	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	

EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. I)

SAMPLE

STEP 1: ESTABLISH STRATEGIC CONTEXT		
TASK 1: Gather Financial Data	To whom will you delegate?	Marcus (CFO)
	When will you assign them this task?	3/1
	What information will you include?	The financials sheet on page 51.
	By when should the task be completed?	4/1
TASK 2: Compile Employee Survey Results	To whom will you delegate?	Leah (COO)
	When will you assign them this task?	3/1
	What information will you include?	The survey questions on page 53.
	By when should the task be completed?	4/1
TASK 3: Capture Key Initiative and Goal Updates	To whom will you delegate?	The executive team—divided by goal
	When will you assign them this task?	3/1
	What information will you include?	The Goal Status form on page 57.
	By when should the task be completed?	4/1
TASK 4: Revisit Mission and Values	Who will join you in this meeting?	The executive team
	When will you meet?	3/25
	Who will be responsible for preparing the final document?	Liam (EA)
	By when will the document be complete?	4/1
TASK 5: Capture Current Reality	To whom will you delegate?	The executive team—divided by products/ stakeholders
	When will you assign them this task?	3/1
	What information will you include?	The current reality form on page 71.
	By when should the task be completed?	4/1

STEP 2: EVALUATE THE PAST

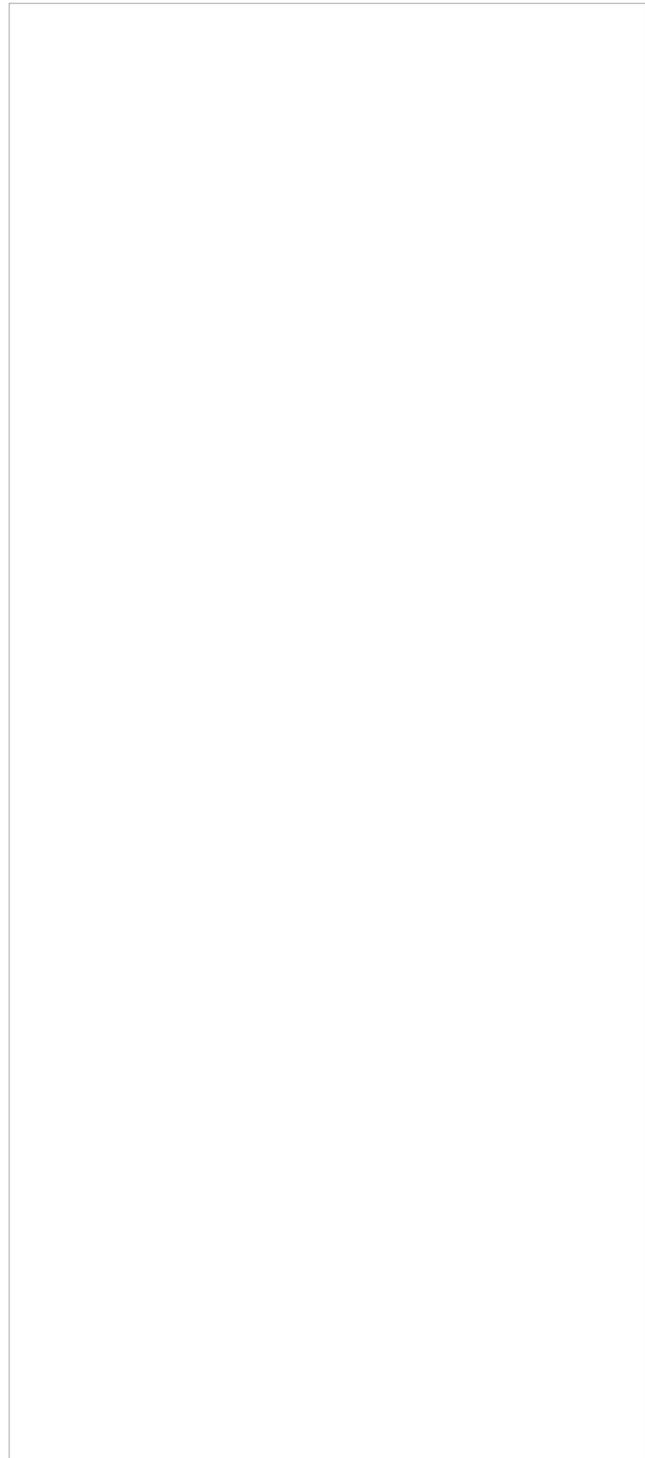
INTRODUCTION

Great coaches review the tapes of their team's performance. They notice strengths and weaknesses. They plan future drills and practices. They use their knowledge from the past to plan for their success in the future.

In **Step 2: Evaluate the Past**, you'll do the same. You'll analyze three sources you've already gathered in **Step 1**. For each, you'll walk through the same straightforward process of analysis.

Before beginning this process, it's important to remind your executive team of the power of mindset. It's easy to get defensive when evaluating the past. It will be essential for each person present to intentionally disarm their defenses and extend grace both to themselves and to their colleagues. Remember: You're all on the same team.

In this step, you'll analyze three sources.



SOURCE 1: FINANCIAL DATA

Most leaders' decisions involve financial implications. Understanding how your actions affect your bottom line is essential for leading your company into a better future. Therefore, you'll analyze your financial data by walking through the following three phases.

PHASE 1: UNDERSTAND THE DATA

In this phase, the individual who best understands the financials of your company—likely your CFO—will present an overview of your financial history and current standing. This presentation should be brief, 15–20 minutes total, and should allow time for questions.

PHASE 2: ANALYZE PAST PERFORMANCE

Now, answer two simple questions: What worked? What didn't? Knowing what worked will help you capitalize on your strengths. Knowing what didn't will identify where to try something different.

PHASE 3: STATE FUTURE INTENTIONS

Turn your reflections into future lessons by answering two questions: What will you keep doing? What will you

change moving forward? Write these statements specifically and concretely.

SOURCE 2: EMPLOYEE SURVEY

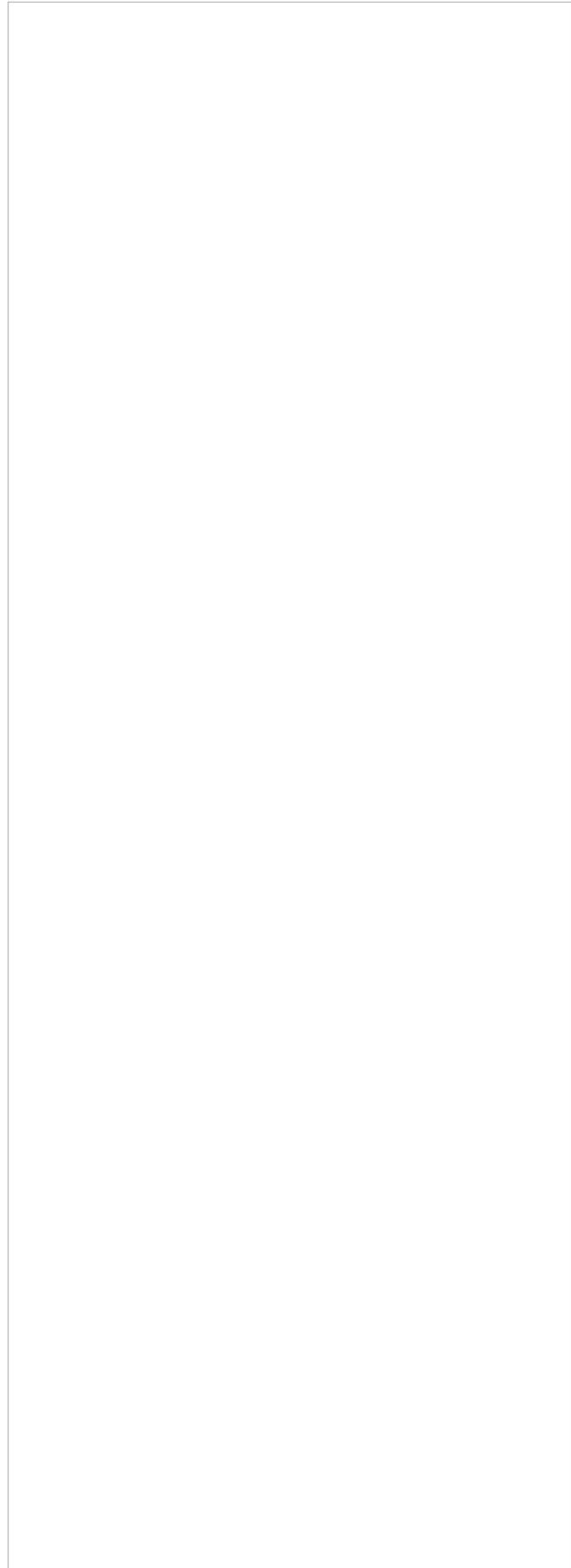
During Step 1: Establish Strategic Context, the employee survey was conducted and the findings were distilled by your human resources or administrative team. Now, it's time to use these distilled reports and walk through the same three-phase process.

PHASE 1: UNDERSTAND THE DATA

Here, the CEO, COO, or an HR representative should present a high-level overview of the data mined from the employee survey. Special attention should be paid to insights into morale, culture, areas for improvement, and new ideas.

PHASE 2: ANALYZE PAST PERFORMANCE

Now, answer two simple questions: What worked? What didn't? Knowing what worked will help you capitalize on your strengths. Knowing what didn't will identify where to try something different.





PHASE 3: STATE FUTURE INTENTIONS

Turn your reflections into future lessons by answering two questions: What will you keep doing? What will you change moving forward? Write these statements specifically and concretely.

SOURCE 3: KEY INITIATIVES AND GOALS

It's essential to measure what actually happened against what you wanted to happen. You can gain this insight by following the same three-phase process.

PHASE 1: UNDERSTAND THE DATA

In this phase, a single leader can give an update on all goals. Or, this work can be divided, with the leaders responsible for each goal providing an update. The **Goal Status Report** should be used as a guide, and the presentation should be less than half an hour total.

PHASE 2: ANALYZE PAST PERFORMANCE

Now, answer two simple questions: What worked? What didn't? Knowing what worked will help you capitalize on your strengths. Knowing what didn't will identify where to try something different.

PHASE 3: STATE FUTURE INTENTIONS

Turn your reflections into future lessons by answering two questions: What will you keep doing? What will you change moving forward? Write these statements specifically and concretely.

We've created templates you can use to guide you through the three-phase process for each source. You'll find these templates on pages 77–87.

CONCLUSION

At the completion of **Step 2: Evaluate the Past**, you'll have an understanding of what happened. You'll have insight into why it happened. And you'll have a clear list of guidelines for what you'll do differently moving forward.

One last note. If you were unable to finish building your current reality during **Step 1**, now is the time to add any finishing touches. This task should be delegated to someone who has access to the details of the meeting you just completed.

Now, you're ready to begin envisioning your future. That's where we're headed in **Step 3**.

A large, empty rectangular box with a thin black border, occupying the right half of the page. It is intended for the user to write their responses to the questions in Phase 3.



EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. II)

STEP 2: EVALUATE THE PAST		
MEETING DETAILS	When will the meeting be held?	
	Who will attend?	
	What information will you include?	
	For how long?	
SOURCE 1: Financial Data	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	
SOURCE 2: Employee Survey	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	
SOURCE 3: Key Initiatives and Goals	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	

EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. II)

SAMPLE

STEP 2: EVALUATE THE PAST		
MEETING DETAILS	When will the meeting be held?	4/8/2022
	Who will attend?	The executive team and all EAs
	What information will you include?	Andrea (EA)
	For how long?	4 hours
SOURCE 1: Financial Data	Who will synthesize and present the relevant information?	Marcus (CFO)
	How long should their presentation be?	15-20 min
	By when should they be ready to present?	4/6/2022
SOURCE 2: Employee Survey	Who will synthesize and present the relevant information?	Leah (COO)
	How long should their presentation be?	15-20 min
	By when should they be ready to present?	4/6/2022
SOURCE 3: Key Initiatives and Goals	Who will synthesize and present the relevant information?	The executive team
	How long should their presentation be?	3 min. per goal
	By when should they be ready to present?	4/6/2022

STEP 3: ENVISION THE FUTURE

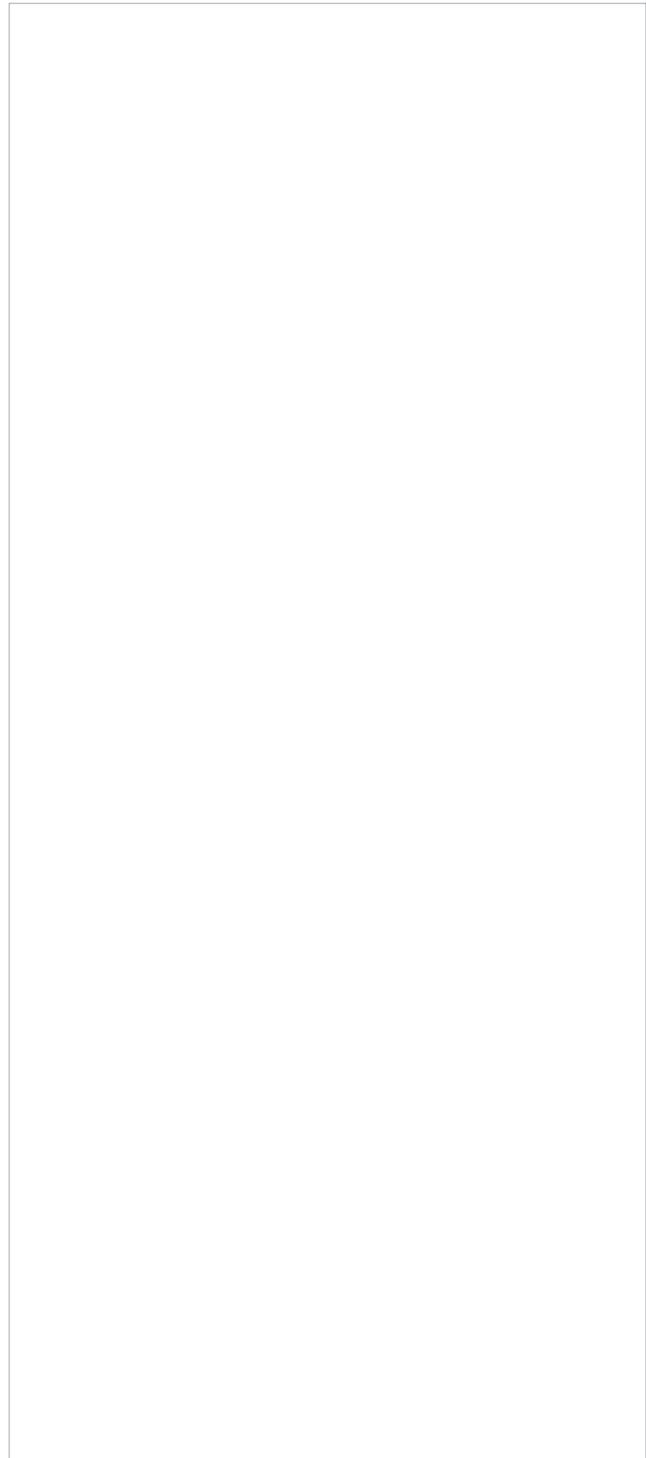
INTRODUCTION

When we're pursuing any difficult endeavor, we inevitably hit a point when we're convinced we can't go any further. We've come too far to turn back but success seems distant. It's in those moments that we most need to glimpse the finish line.

When you envision the future of your company, you must ensure everyone on your team can see the finish line. It needs to be so concrete and specific that it is easily beheld by the mind's eye of each person on your team. Then, in the most challenging circumstances, you can help your team glimpse the vision on the horizon and stir the motivation to press on.

In **Step 3: Envision the Future**, you move from being a detective to a dreamer. By the end of this step, you'll have a vision script composed of three parts:

- Your **Mission and Values** will describe *who you are*.
- Your **Current Reality** will describe *where you are*.
- Your **Future Reality will** describe *where you're going*.



To complete this document, you'll walk through four stages.

STAGE 1: FINALIZE MISSION AND VALUES

You already revisited your mission and values at the start of the Strategic Design process. Now, it's time to give them one final look. After reviewing them this last time, we'll consider them final until you go through Strategic Design again next year. Consider:

- Do you still believe in them?
- Do they still communicate the heartbeat of your company?
- Do they say what you want them to say?

If so, you're ready for stage 2.

STAGE 2: FINALIZE CURRENT REALITY

You've already delegated the compilation of your current reality during the first step of the Strategic Design process. Now, read it aloud to review with your executive team. Make any necessary adjustments or revisions. Then, you're ready for stage 3.

STAGE 3: ENVISION FUTURE REALITY

Envisioning your future reality relies on the same structure and format as capturing your current reality. But this time, you're

going to stand in the future three years from now and describe what you see. Your vision should meet four criteria:

CRITERION 1

It describes a 3-year horizon. It's written as though you're describing your present 3 years from now.

CRITERION 2

It involves substantial increase. It feels risky.

CRITERION 3

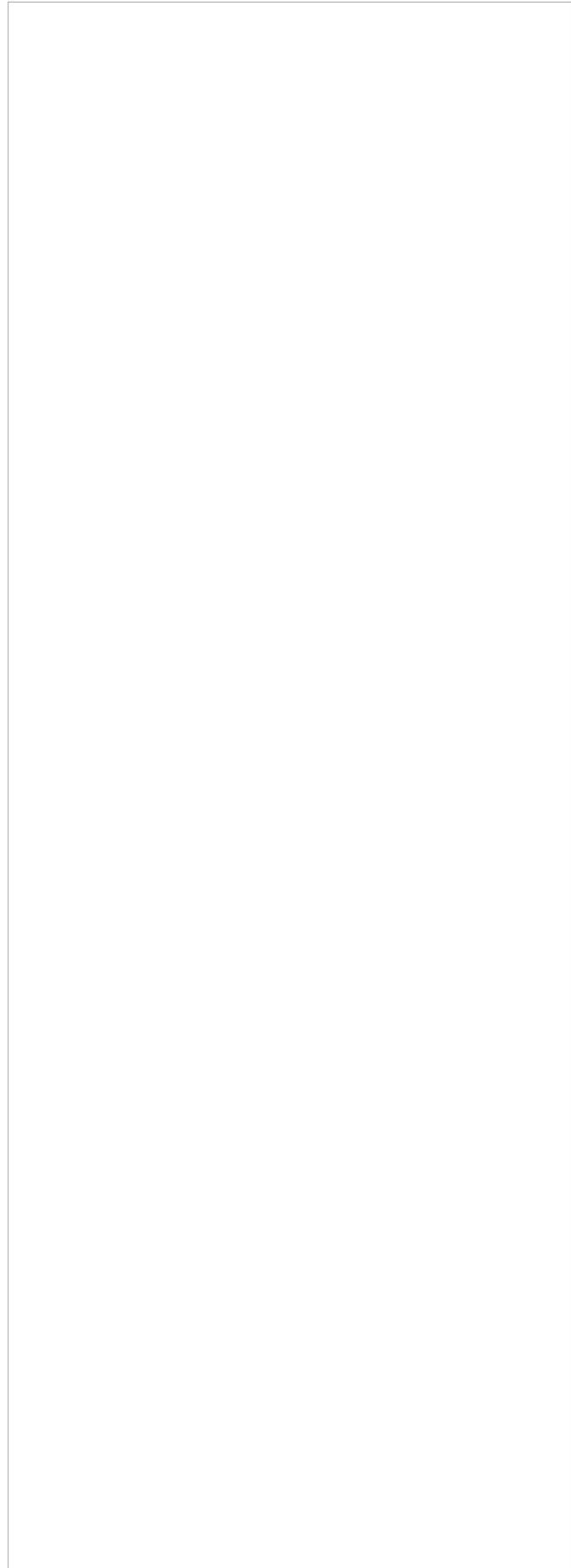
It requires whole-company focus. No one department can handle it alone. Everyone must pitch in.

CRITERION 4

It explains what, not how. Vision is the destination, not the route.

Dream about the future with as much specificity as possible. As you fill out your future reality, you'll end up answering questions like—

- What products, new and old, are you offering?
- How much money are you making?
- How has your team grown?
- What customers are you serving?
- How has your customer base and board become more diverse?



Once you've listed your future products and stakeholders, it's time for the final stage.

STAGE 4: PUT THE PIECES TOGETHER

You've now completed all three parts of your vision script.

1. You've **finalized your Mission and Values**, articulating who you are.
1. You've **finalized your Current Reality**, outlining where you are.
1. You've **envisioned your Future Reality**, determining where you're going.

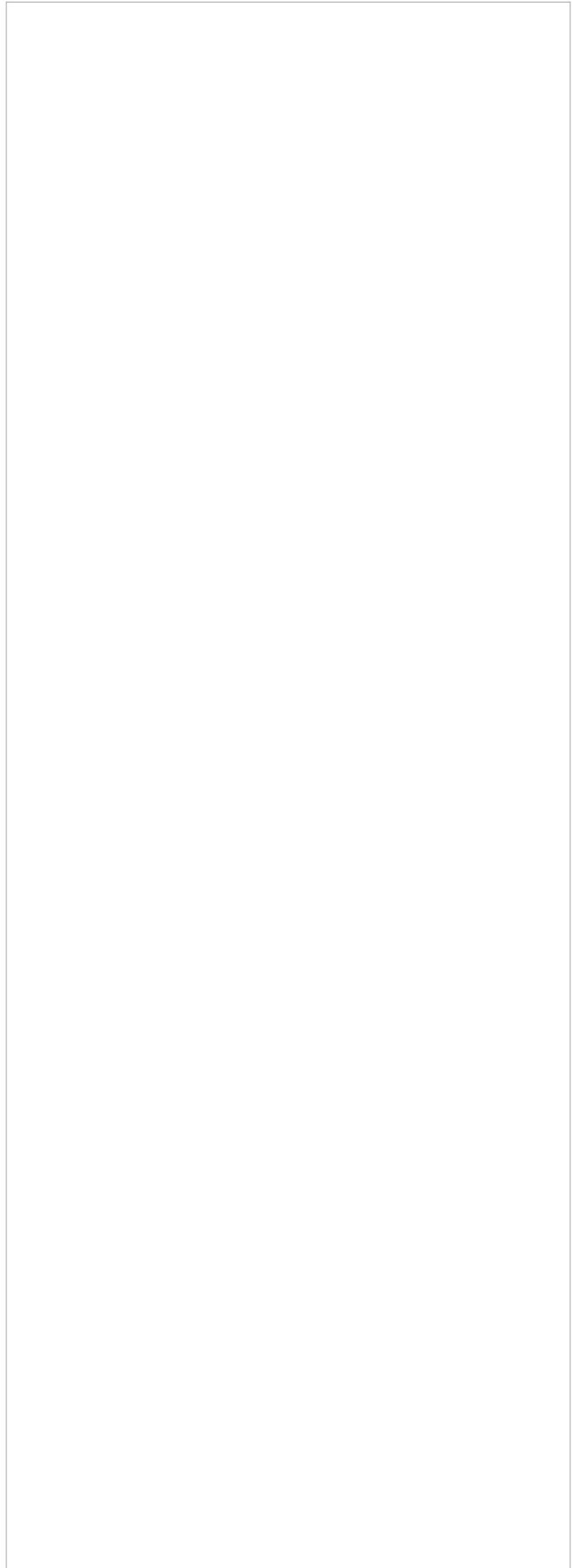
To end, it's time to put these three pieces together in a single document. We recommend utilizing Google Documents due to their ease of sharability, but any word-processing system is sufficient.

Copy-paste your mission and values. Then, copy-paste your current reality. Finally, copy-paste your future reality. Your final product should resemble the sample on page 71.

Once complete, read it aloud beginning to end. Tweak as needed. Then, celebrate. You have a completed Vision Script!

CONCLUSION

You've gathered facts, analyzed and learned from the past, and envisioned your future specifically and concretely. Now, all that's left is to start breaking down your vision into increasingly smaller actions. That's where we're headed for Strategic Design: Part II. So join us next intensive to delve into steps 4–9 of the Strategic Design process.



EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. III)

STEP 3: ENVISION THE FUTURE	
Who will join this meeting?	
Who will facilitate this meeting?	
How long will this meeting last?	
What day will you meet?	

EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. III)

SAMPLE

STEP 3: ENVISION THE FUTURE	
Who will join this meeting?	The executive team
Who will facilitate this meeting?	Andrea (EA)
How long will this meeting last?	6 hours
What day will you meet?	4/11

APPENDIX A: KEY DEFINITIONS

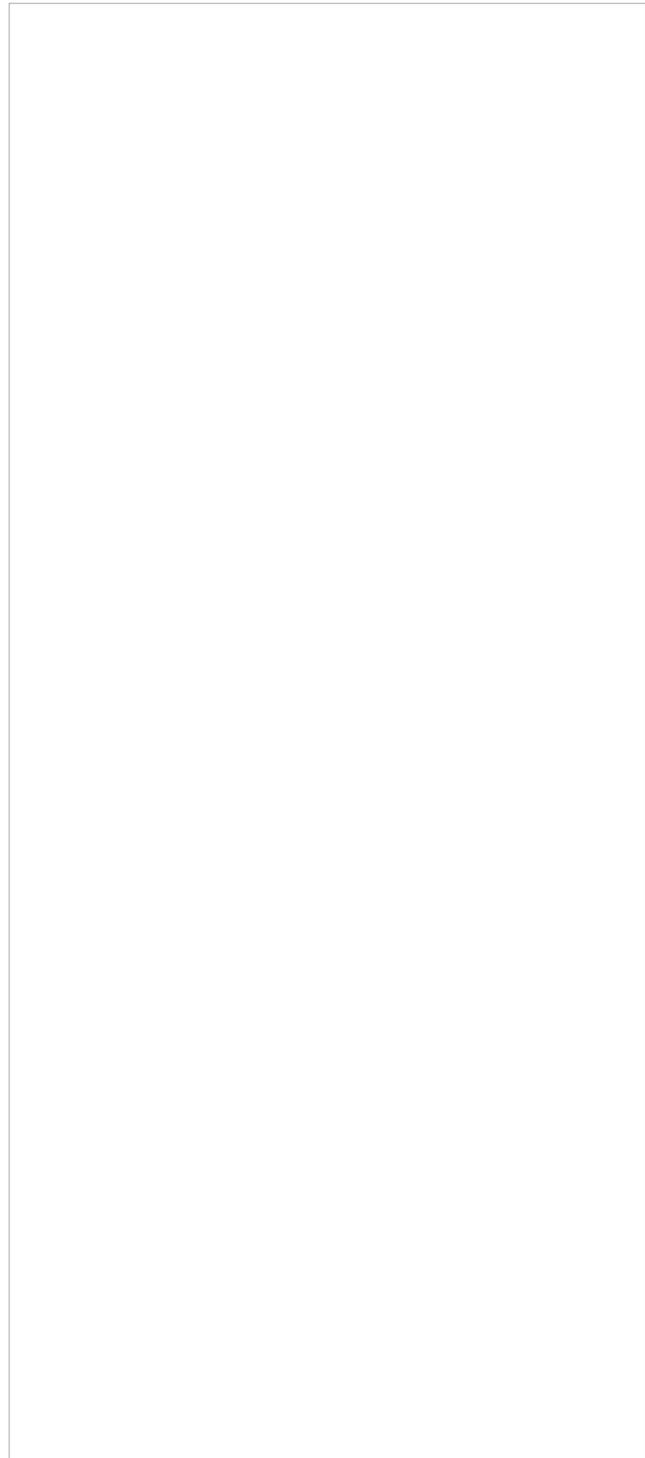
INTRODUCTION

Your Kolbe score measures the instinctive ways you take action—how you respond and problem-solve when you're under pressure.

- **Fact Finder** deals with detail and complexity, providing the perspective of experience.
- **Follow Thru** deals with structure and order and provides focus and continuity.
- **Quick Start** deals with originality, risk-taking and uncertainty.
- **Implementor** deals with physical space and ability to operate manually, and provides durability and a sense of the tangible.

We'll focus on your **Fact Finder**, **Follow Thru**, and **Quick Start** scores, which will have the most influence on your ability to respond with agility.

Your score for each strength falls into one of three categories.





APPENDIX B: KEY DEFINITIONS

ROLE	STEP 3: ENVISION THE FUTURE
CEO	Delivers the annual initiatives and fulfills the vision.
Executive	Delivers goals, enabling CEO to deliver the annual initiatives and fulfill the vision.
Director	Delivers major projects, enabling executives to deliver their goals.
Project manager	Delivers minor projects and keeps major projects on track by coordinating activity within and across departments, enabling directors to deliver their major projects.
Individual contributor	Completes individual projects and tasks, factoring deadlines set by project managers, to keep minor and ultimately major projects on track—on up the chain to a completed vision.





APPENDIX C: STRATEGIC DESIGN MEETING MAP (STEPS 1–3)

STEP 1: ESTABLISH STRATEGIC CONTEXT	
<i>Synchronous Meetings</i>	<i>Asynchronous Work</i>
<p>Task 4: Revisit Mission and Values <i>Executive team. 1–2 hours.</i></p>	<p>Task 1: Gather Financial Data Task 2: Compile Employee Survey Results Task 3: Capture Key Initiative and Goal Updates Task 5: Capture Your Current Reality</p>

STEP 2: EVALUATE THE PAST	
<i>Synchronous Meetings</i>	<i>Asynchronous Work</i>
<p>Task 4: Revisit Mission and Values <i>Executive team. 2-3 hours. Analyze three sources:</i></p> <ul style="list-style-type: none"> • Source 1: Financial Data • Source 2: Employee Survey • Source 3: Initiatives & Goals 	<p>Add finishing touches to Current Reality, if necessary.</p>

STEP 3: ENVISION THE FUTURE	
<i>Synchronous Meetings</i>	<i>Asynchronous Work</i>
<p>Envision the Future. <i>Executive team. 2-3 hours. Complete four stages:</i></p> <ul style="list-style-type: none"> • Stage 1: Finalize Mission & Values • Stage 2: Finalize Current Reality • Stage 3: Envision Future Reality • Stage 4: Put the Pieces Together 	<p>None.</p>



STEP 1:

Establish Strategic Context

OVERVIEW

INTRODUCTION

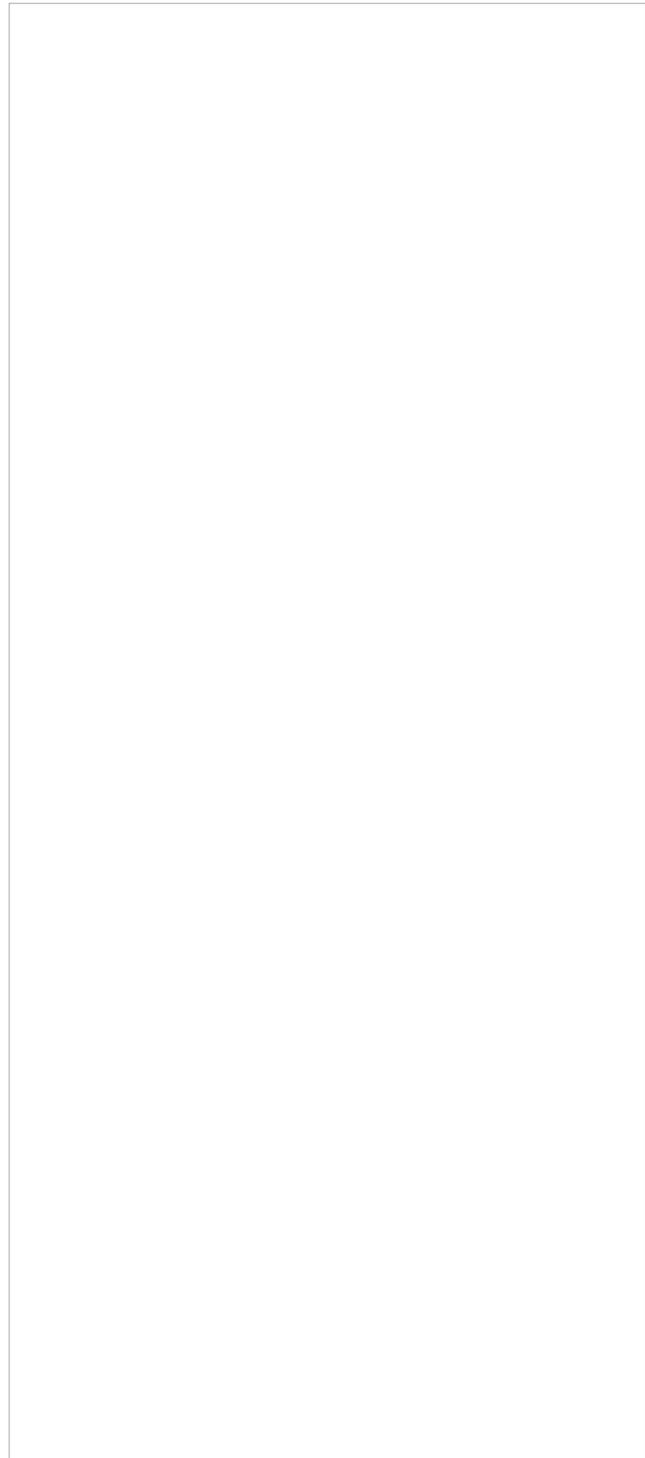
In **Step 1: Establish Strategic Context**, your job is to ensure five tasks are completed. Completing these tasks will streamline the Strategic Design process.

TASK 1: GATHER FINANCIAL DATA PAGE 51-52

This task should be delegated to your finance team. Your CFO should then compile the data into a straightforward presentation of 15–20 minutes for your executive team.

TASK 2: COMPILE EMPLOYEE SURVEY RESULTS | PAGE 53–56

This task should be delegated to your operations and human resources team. Your team should be given at least two weeks to complete the survey and should be provided with ample reminders as necessary. HR should compile results.





TASK 3: CAPTURE KEY INITIATIVE AND GOAL UPDATES | PAGE 57–58

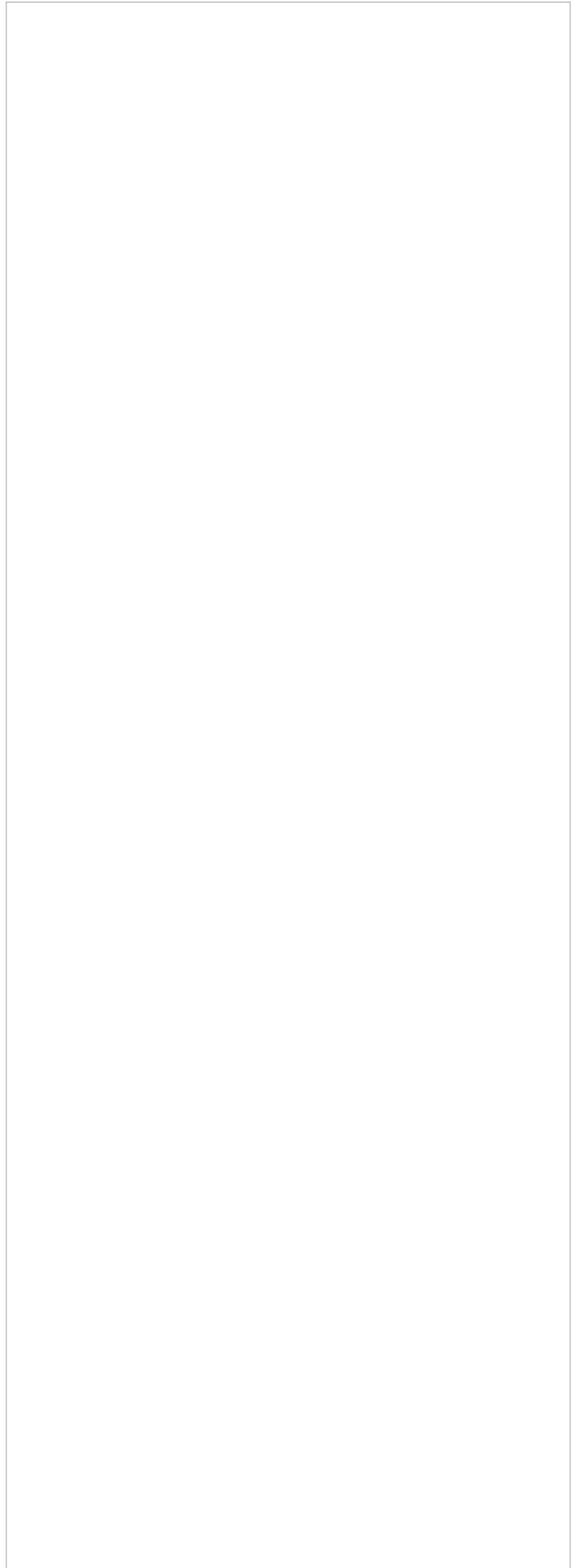
This task should be delegated to the people responsible to deliver on company goals over the past twelve months. Each individual should provide a one-sentence update to a single, central individual—likely your executive assistant. This assistant should, in turn, compile all goal updates in the goal status form. Additionally, goal holders should be prepared to talk for 1–2 minutes about each of the goals for which they were responsible.

TASK 4: REVISIT MISSION AND VALUES | PAGE 59–70

This task should be completed during a meeting between the executive team, at least two hours in length. During this process, the company mission and values should be revisited in turn for consideration and revision. If you need help streamlining or restructuring your goals, we've provided ample tools in the following pages.

**TASK 5: CAPTURE YOUR
CURRENT REALITY | PAGE
71-72**

This task should be delegated to the individuals with the best insight into each of the products, programs, services, and stakeholders within your business. Provide each with the standard format we've provided and ask for an update on their area of expertise. These should also be sent to a central individual, like an executive assistant, to be compiled into a single document.





FINANCIAL DATA

The following list includes best metrics to get a complete picture of your business's financial status. If you do not have a full five years of data, go back as far as you can.

FINANCIAL STATEMENT VIEWS

INCOME STATEMENT

- Year-to-date income statement vs prior year and budget for the current year and each year before that. Include any relevant statistical measures such as volume and rate (same-store view if applicable)
- Current year forecast
- Trailing Twelve-Month Trends: Detailed Income Statement, Volume, Rate

BALANCE SHEET

- Trailing Twelve-Month for the current year
- Year-end balance sheet for the previous five years





STATEMENT OF CASH FLOW

- Trailing Twelve-Month for the current year
- Year-end cash flow for the previous five years

OTHER METRICS (SHOULD INCLUDE TRENDS FOR THE PAST YEARS)

Here are a few high-level financial metrics to include. However, be sure to include any other areas that determine the financial health of your business. For example, debt covenants or other critical measures for your year-end analysis.

- Gross Margin
- Profit Margin
- Leverage Ratio
- Debt to Equity
- Inventory Turnover
- Working Capital
- Days Sales Outstanding
- Accounts Receivable Turnover

EMPLOYEE SURVEY SAMPLE

Below is a list of sample questions for your employee survey. You can send out your employee survey using a service like Google Forms or Survey Monkey. We suggest sending it out at least two weeks before you initiate strategic planning, and reminding your team to complete it every few days until the strategic planning process begins.

EMPLOYEE SURVEY

Your input matters. Your feedback will be taken into account as the executive team completes the strategic planning process and maps out the trajectory of our company over the next three years.

1. On a scale of 1–5, how connected do you feel to the mission of our company shared below?

[INSERT MISSION]

- 5 - Very Connected
- 4 - Mostly Connected
- 3 - Connected
- 2 - Mostly Disconnected
- 1 - Very Disconnected

2. Is there anything we could do to help you feel more connected to our mission, core values and message? If so, what?

3. On a scale of 1–5, how comfortable do you feel sharing feedback with your direct supervisor (be it positive or negative)?

- 5 - Very Comfortable
- 4 - Mostly Comfortable
- 3 - Comfortable
- 2 - Mostly Uncomfortable
- 1 - Very Uncomfortable

4. On a scale of 1–5, how satisfied do you feel with the fit of your position—in your opportunities to complete work for which you have both passion and proficiency?

5 - Very Satisfied

4 - Mostly Satisfied

3 - Satisfied

2 - Mostly Dissatisfied

1 - Very Dissatisfied

5. On a scale of 1–5 how satisfied are you with your current and future ability to gain new experiences, thrive, and grow at our company?

5 - Very Satisfied

4 - Mostly Satisfied

3 - Satisfied

2 - Mostly Dissatisfied

1 - Very Dissatisfied

6. What suggestions do you have to help us help you gain new experiences, thrive, and grow here short term and long term?

7. How frequently do you typically take evenings and weekends off?

I almost always take evenings and weekends off.

I sometimes take evenings and weekends off.

I rarely take evenings and weekends off.

8. Have you taken at least one vacation where you were completely unplugged from work in 2021? (Answer "yes" as a default if you've been working with the company less than 60 days and have not taken PTO yet)

Yes

No

9. How do you feel your compensation level compares to people in similar roles in our area?

10. On a scale of 1–5, how satisfied are you with your benefits package?

5 - Very Satisfied

4 - Mostly Satisfied

3 - Satisfied

2 - Mostly Dissatisfied

1 - Very Dissatisfied

11. When considering our benefits package, what's your favorite benefit that we offer?

12. Do you have any suggestions for how we could improve our benefits package?

13. Have your experiences since coming to this company led you to become more understanding and appreciative of racial and ethnic differences and the value of diversity?

5 - Strongly Agree

4 - Somewhat Agree

3 - Neutral

2 - Somewhat Disagree

1 - Strongly Disagree

14. What suggestions do you have to help us be better champions for diversity within our organization and externally with what we share publicly?

15. On a scale of 1–5, how satisfied are you with your job overall?

5 - Very Satisfied

4 - Mostly Satisfied

3 - Satisfied

2 - Mostly Dissatisfied

1 - Very Dissatisfied

16. Is there something we could do to increase your overall job satisfaction? If so, what?
17. What do you think our greatest win as a company has been so far this year?
18. What do you think our greatest disappointment has been as a company so far this year?
19. Looking ahead to next year, what do you think our top challenge or problem as a business is?
20. What's a new idea, opportunity, or initiative you think we should consider pursuing as a business in the next year (or in the years to come)?
21. Is there any other feedback you'd like to share with us?

GOAL STATUS REPORT

SAMPLE

GOAL / PROJECT	RELEVANT DETAILS	DUE	ON TRACK
Roll out new product.	User testing took longer than expected. We rolled out 5/31.	5/1	 
Update financial report format.	Internal financial reports were updated to include a live forecast.	7/31	 
Grow email list to 150,000 users.	Email list is currently at 115,000 will determine new strategy.	10/11	 
Complete new video course by 11/1	Recorded on 10/1. On track to release 11/1	11/1	 
			 
			 
			 
			 
			 
			 
			 
			 
			 
			 
			 

To create your own goal status report modeled after the table above, find it at: businessaccelerator.com/goalstatus



REFINING YOUR MISSION

Like following a faulty GPS system, your company can follow avenues that seem right but don't lead you where you want to go. The solution is an accurate map. A clear mission is the map for your company. And you can fine-tune your mission by answering four simple questions.

QUESTION 1

WHO ARE WE?

This question defines your business identity. You must know yourself—your capabilities and desires—to help others. Without a clear identity, you get lost.

EXAMPLES

"We are a leadership development company."

"We are a family-owned restaurant."

"We are a manufacturing company."

QUESTION 2

WHO DO WE SERVE?

This question defines your target customer. You choose your customers, not the other way around. The answer to this question narrows who you serve.

EXAMPLES

"Stressed-out business owners"

"Frustrated car buyers"

"Overwhelmed, successful leaders"

This process helps you stay focused on solving your customer's problem.

QUESTION 3

WHAT DO WE SOLVE?

This question defines your unique solution to the customer's external problem. It narrows what you offer. You can't solve every problem a customer faces, but you can do your part.

EXAMPLES

"We help frustrated car shoppers navigate the car buying process."

"We help stressed-out business owners manage their finances."

"We help overwhelmed parents understand autism."

QUESTION 4

WHAT'S THE RESULT?

This question defines the promised transformation for the customer. It solves both the internal and external problems of your customer. It results in transformation, not just satisfaction. In this way, you specify the impact of your mission on the lives of others.

EXAMPLES

Michael Hyatt & Company:

". . . so that they win at work and succeed at life."

(From overwhelm to success.)

Betterment:

". . . empower you to make the most of your money, so you can live better."

(From disempowered (implied) to living better.)

Facebook

". . . give people the power to build community and bring the world closer together."

(From disempowered and disconnected to empowered and in community.)

People don't buy products. They buy transformation. When you help your customer transform, your business will succeed.

MISSION FORMULATOR

SAMPLE

Complete the sentences to draft a clear mission for your business.

BUSINESS IDENTITY	
WE ARE	A boutique accounting firm
TARGET CUSTOMER	
WE HELP	Overwhelmed small business owners
UNIQUE SOLUTION	
DO/ UNDERSTAND	Understand their financial history, current position, and cash flow
PROMISED TRANSFORMATION	
SO THAT	They can make timely, informed decisions that will grow their businesses with an acceptable level of risk
Based on your answers above, formulate your final mission statement below.	
FINAL MISSION STATEMENT	
We are a boutique accounting firm. We help overwhelmed small business owners understand their financial history, current position, and cash flow so they can make timely, informed decisions that grow their businesses with an acceptable level of risk.	

To update your mission statement using the Mission Formulator, find it at: businessaccelerator.com/missionformulator



REFINING YOUR VALUES

Your company culture can make or break your business. A healthy culture produces engagement, collaboration, and innovation. An unhealthy culture produces lack of ownership, absenteeism, and high employee turnover. And you have the power to shape your company's culture by defining your core values.

Your core values are composed of two parts:

PART ONE A concise phrase that evokes the value.

PART TWO A narrative statement about how that value comes alive in your business.

You want to have as many core values as you need, but as few as possible. The sweet spot is between 5 and 10. Create your core values keeping the following three characteristics in mind.

CHARACTERISTIC 1

CORE VALUES ARE ASPIRATIONAL.

Your values should define the culture you need, not necessarily the one you have. Aspirational values inspire your team and appeal to the best in your team. They call people to the best versions of themselves. But core values are written as though they are already reality. Not "We strive to be . . ." but "We are . . ." They are positive, written to excite others.

CHARACTERISTIC 2

CORE VALUES ARE RELEVANT.

What are the core characteristics your team needs to succeed? These characteristics should be important to your team, even if imperfectly modeled. They should be unique to your business—to you, your team, and your mission. They should also be crystal clear, able to guide decision making.

EXAMPLE

Affirm (Financial Services Company)

People come first.

We consider our impact on people's lives before we think about our own interests.

No fine print.

We are completely transparent and honest—with our own customers and with each other.

It's on us.

We take full accountability for our actions, never shirking responsibility or passing the buck.

Simpler is better.

We make complex things simple and clear.

Push the envelope.

We never stop innovating, taking smart risks, and raising the bar.

CHARACTERISTIC 3

CORE VALUES ARE MEMORABLE.

If your core values are not memorable, they are not useful because they won't guide decision making. Every person should be able to recall them.

One way to make your core values memorable is to keep them few in number. Another way is to add a modifier. This can add clarity and specificity and make the value more exciting. Try to use the same part of speech for each value. And never sacrifice clarity for cleverness.

EXAMPLE

Full Focus Co.

Unyielding Integrity

Total Ownership

Prioritizing People

Intentional Margin

Enthusiastic Contribution

Relentless Wow

High Leverage

Continuous Growth

Your company has a culture whether you are aware of it or not. It's a culture you can shape by the core values you set forth. Use core values as the foundation of the culture you need to succeed.

CORE VALUES MENU

SELF

Unyielding integrity

Servant hearted

Routine transparency

Rare bravery

Reflexive honesty

Prizing intelligence

Playful learning

Continuous growth

Value conscious

Unapologetic passion

Constant courage

Contagious joy

Extreme ownership

Deliberately detailed

Heroic helpfulness

TEAM

Prioritizing people

Enthusiastic contribution

Vibrant diversity

Family friendly

Intentional margin

No nonsense

Refreshing openness

Intense listening

Intentional collaboration

Habitually competitive

Straight shooting

Solution oriented

Intentionally playful

Radical candor

Thoughtful compassion

MARKET

High leverage

Future forward

Fair trade

Customer-centric

Relentless wow

Highly responsive

Readily reliable

Responsible stewardship

Growth conscious

Endlessly innovative

Meticulous quality

Extraordinary service

Unparalleled ease

Profitable sustainability

Consistent craftsmanship



LISTING YOUR CORE VALUES

SAMPLE

Establish 5–10 core values for your business. Reference the Core Values Menu on page 31. Once you're done, copy and paste your core values into this template.

1	2
<p style="text-align: center;"><i>INCLUSIVITY</i></p> <p>We value a diverse culture where everyone belongs. Different backgrounds and experiences contribute to the strength of our team and allow us to serve our clients to the best of our ability.</p>	<p style="text-align: center;"><i>INTEGRITY</i></p> <p>We stand for what's right. No matter how much it costs, we own our mistakes, follow through on our commitments, and operate within industry laws and guidelines.</p>
3	4
<p style="text-align: center;"><i>INITIATIVE</i></p> <p>We don't settle. We are constantly seeking new opportunities and strategies for our clients.</p>	<p style="text-align: center;"><i>INNOVATION</i></p> <p>We regularly look for new and better ways to do things, never settling for the status quo. We challenge ourselves to consistently learn and grow and invest in team development.</p>
5	6
<p style="text-align: center;"><i>INSIGHT</i></p> <p>We intentionally stay up-to-date on current industry trends and technology, which ensures we are always prepared for what comes next.</p>	
7	8
9	10

If you find it helpful to model your values as above, find it at: businessaccelerator.com/corevalues



MISSION AND VALUES

SAMPLE

The following is an example of how to define your Mission and Values.

MISSION

We are a full-service commercial real estate company. We create real estate solutions for industrial and office owners, lessors, and tenants. With our cutting-edge resources and skilled professionals, we connect our clients with their communities and give them the space and foundation to grow their businesses.

VALUES

INCLUSIVITY

We value a diverse culture where everyone belongs. Different backgrounds and experiences contribute to the strength of our team and allow us to serve our clients to the best of our ability.

INTEGRITY

We stand for what's right. No matter how much it costs, we own our mistakes, follow through on our commitments, and operate within industry laws and guidelines.

INITIATIVE

We don't settle. We are constantly seeking new opportunities and strategies for our clients.

INNOVATION

We regularly look for new and better ways to do things, never settling for the status quo. We challenge ourselves to consistently learn and grow and invest in team development.

INSIGHT

We intentionally stay up-to-date on current industry trends and technology, which ensures we are always prepared for what comes next.

To structure your mission and values list as above,
find it at: businessaccelerator.com/missionandvalues



CURRENT REALITY

SAMPLE

The following is an example of how to fill out your Product Details form.

RESULTS

We generated \$28.4 million in revenue and \$3.7 million in EBITDA (13%).¹

PRODUCTS, SERVICES, AND PROGRAMS

INVESTMENT/SALES	
DESCRIPTION	We represent several strong investment clients, which leads to business across all our service platforms. We offer seller and buyer services for investors and individual building owners.
WHY WE'RE EXCITED	We get most of our business word-of-mouth, because our clients are satisfied with our negotiations and how easy we make the selling and buying processes. We have a strong team that is continuing to grow this department. Right now this is our fastest-growing service. We grew 20% over the previous year and have added two new agents to this department. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors
SCOPE	2.5M square feet industrial; 3.8 M office
REVENUE	\$9.9M
PROFIT	\$1.3M

LEASING	
DESCRIPTION	We offer leasing services to our investment clients, which includes landlord representation and tenant representation.
WHY WE'RE EXCITED	This continues to be our most profitable service. We have decades of experience and repeat clients that contribute to the stability of our business. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors, tenants, and prospective tenants
SCOPE	18M square feet industrial, 15.4M office
REVENUE	\$11.4M
PROFIT	\$1.5M

1 Revenue numbers are year-end projections for 2021.

To fill out your Product Details form, find it at
businessaccelerator.com/productdetails

The following is an example of how to fill out your **Stakeholder** Status form.

REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a strong, loyal team whose average tenure is 12 years. Our compensation structure is fair and incentivizes our salespeople. We balance their experience as contractors well to make everyone personally feel a part of our mission
NUMBER	24
DEMOGRAPHICS	68% men, 32% women, 80% white, 20% people of color
POPULAR BENEFITS	Compensation and incentive plans, office space

REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a hardworking, enthusiastic team who stays on top of the latest technology and trends and works collaboratively to create a well-rounded and satisfying client experience. We experience very little turnover and have a culture of initiative and excellence.
NUMBER	42
DEMOGRAPHICS	72% women, 28% men, 65% white, 35% people of color
POPULAR BENEFITS	Career development/education funds, flexible hours/remote work, 401K matching, health insurance benefits

To fill out your Product Details form, find it at businessaccelerator.com/productdetails

STEP 2:
Evaluate the Past

OVERVIEW

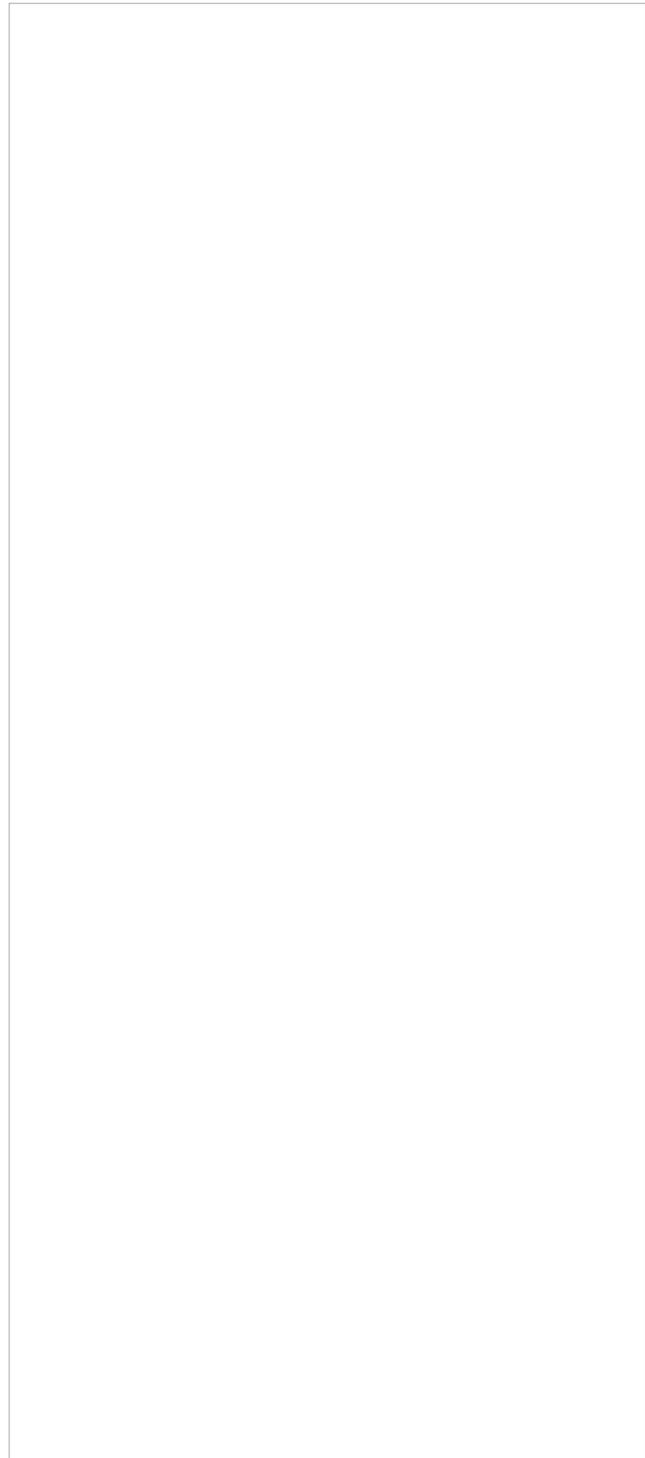
INTRODUCTION

In **Step 2: Evaluate the Past**, the executive team will meet for at least two hours to analyze three sources of information. This analysis will consist of repeating the same three-phase process.

SOURCE 1: FINANCIAL DATA | PAGE 77-79

Start by analyzing the finances of your company, from up to the last five years.

- Phase 1: Understand the Data | CFO presents presentation on company finances.
- Phase 2: Analyze Past Performance | Answer two questions: What worked? What didn't?
- Phase 3: State Future Intentions | Answer two questions: What will you keep doing? What will you change moving forward?





SOURCE 2: EMPLOYEE SURVEY | PAGE 81–83

Refer to the employee survey, which should have been compiled and analyzed by HR.

- Phase 1: Understand the Data | COO or HR representative presents a high-level overview of employee survey results.
- Phase 2: Analyze Past Performance | Answer two questions: What worked? What didn't?
- Phase 3: State Future Intentions | Answer two questions: What will you keep doing? What will you change moving forward?

SOURCE 3: KEY INITIATIVES AND GOALS | PAGE 85–87

This source should be summarized in your Goal Status Report (page 57).

- Phase 1: Understand the Data | Goal owners provide a 1-2 minute update on each of their goals.
- Phase 2: Analyze Past Performance | Answer two questions: What worked? What didn't?
- Phase 3: State Future Intentions | Answer two questions: What will you keep doing? What will you change moving forward?

Capture the results of your analysis on the following pages.

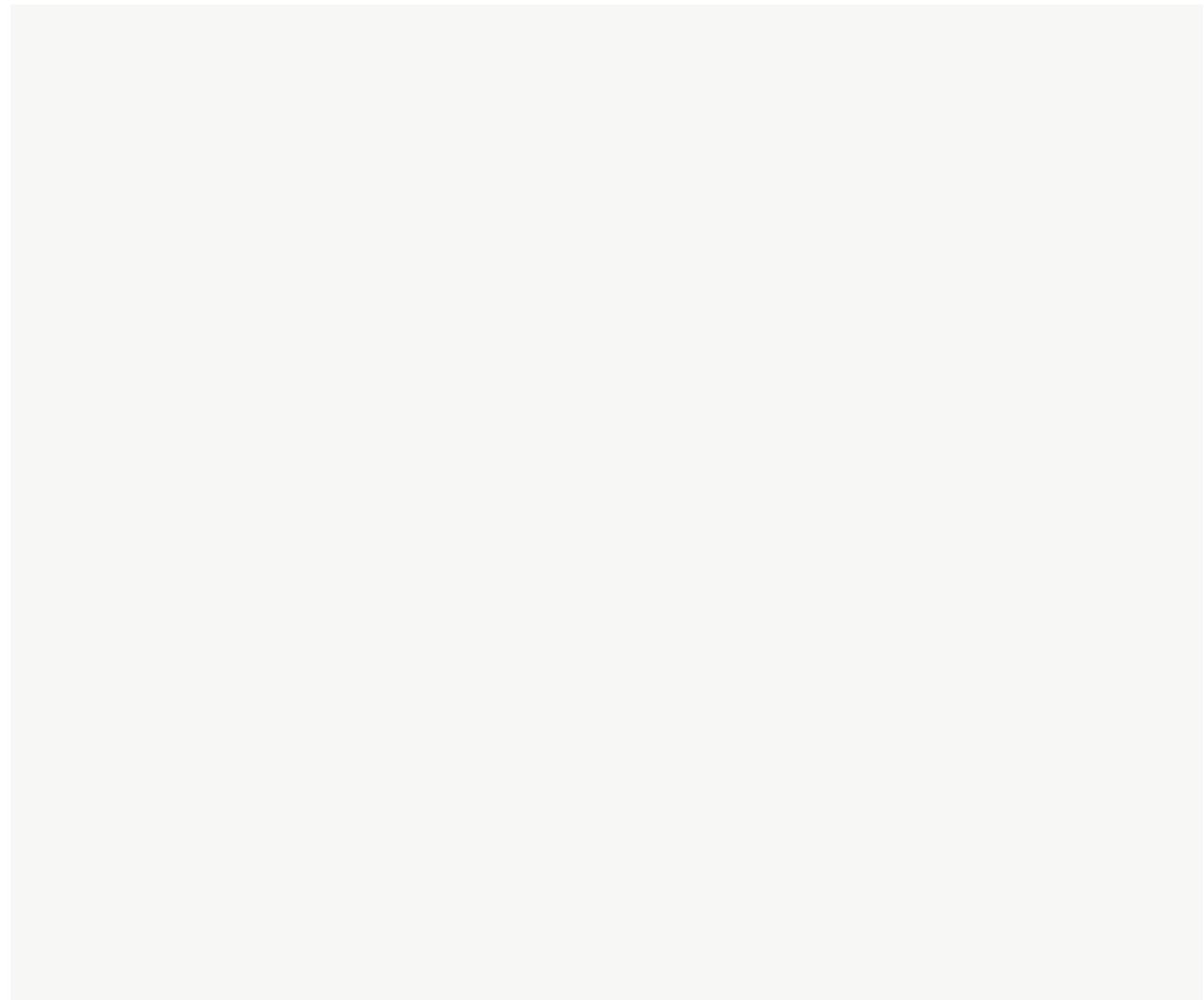
FINANCIAL ANALYSIS

PHASE 1: UNDERSTAND THE DATA

Write down notes or questions during the overview from your CEO or CFO about your company's performance.

EXAMPLE

- There seems to be a trend of going over on expenses each month.
- Our revenue has grown by roughly 8% each year for the past three years.
- We don't have payment tracking, but that would be helpful.



PHASE 2: ANALYZE PAST PERFORMANCE

Write down your observations, answering the following two questions.

WHAT WORKED?	WHAT DIDN'T?
<p>EXAMPLE: We bought our building this year, which significantly contributed to the improvement of the debt-to-equity ratio</p>	<p>EXAMPLE: We are slow to invoice and follow up, which hurts our cash position</p>
<p>Categories to consider: year-to-date income vs. prior year; current year's forecast; trailing twelve-month; year-end balance; year-end cash flow, budget; gross margin; profit margin, profit margin by business segment or product category; leverage ration; debt-to-equity ration; inventory turnover; working capital; accounts receivable turnover</p>	

PHASE 3: STATE FUTURE INTENTIONS

Use your past to inform your future.

WHAT WILL YOU KEEP DOING?	
EXAMPLE: Paying for our admins to get their real estate licenses. It saves our agents time and allows them to focus on closing..	

WHAT WILL YOU CHANGE MOVING FORWARD?	
EXAMPLE: Passively tackling invoice payments. We need to actively track how long it takes to collect payment.	

Rank your intentions about what you'll keep or change in order of highest potential impact using the left column above.



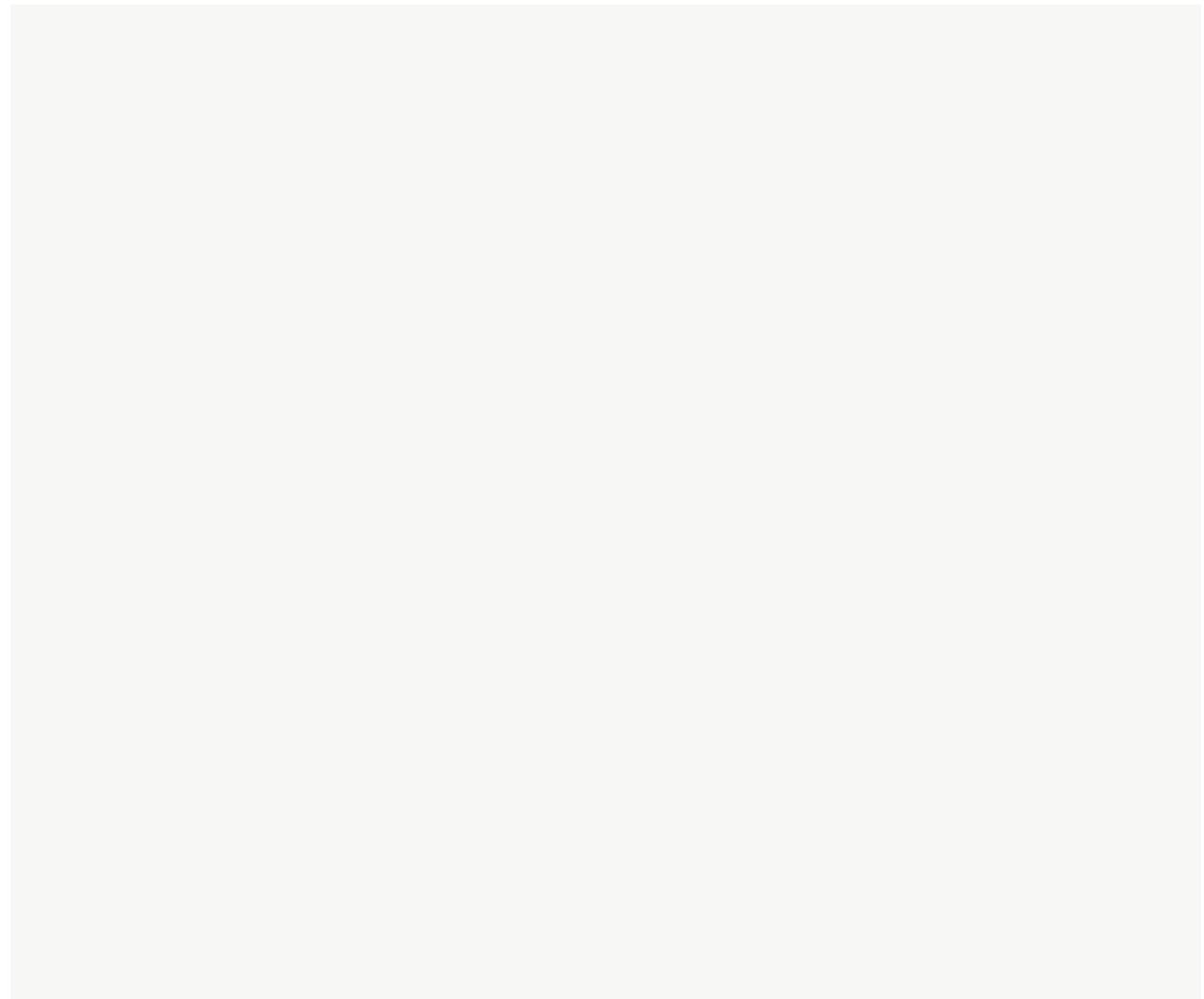
EMPLOYEE SURVEY ANALYSIS

PHASE 1: UNDERSTAND THE DATA

Write down notes or questions during the presentation of your company's survey results.

EXAMPLE

- Most employees reported that they like our benefits package.
- Very few employees said they could recall our core values.
- About half of our employees are aware of what positions we are currently hiring.



PHASE 2: ANALYZE PAST PERFORMANCE

Write down your observations, answering the following two questions.

WHAT WORKED?	WHAT DIDN'T?
EXAMPLE: Almost everyone commented on how much they love quarterly team-building events.	EXAMPLE: Many commented that they feel coming into the office every day isn't the most efficient use of their time.
Categories to consider: company culture; unplugged PTO; compensation and benefits; employee alignment; engagement and morale; company communication and feedback; employee development; diversity, equity, and inclusion; recruiting and retention; onboarding; new ideas	

PHASE 3: STATE FUTURE INTENTIONS

Use your past to inform your future.

WHAT WILL YOU KEEP DOING?	
	EXAMPLE: Quarterly team building events.

WHAT WILL YOU CHANGE MOVING FORWARD?	
	EXAMPLE: Create a flexible work option for full-time employees to come to the office 3–4 days a week.

Rank your intentions about what you'll keep or change in order of highest potential impact using the left column above.



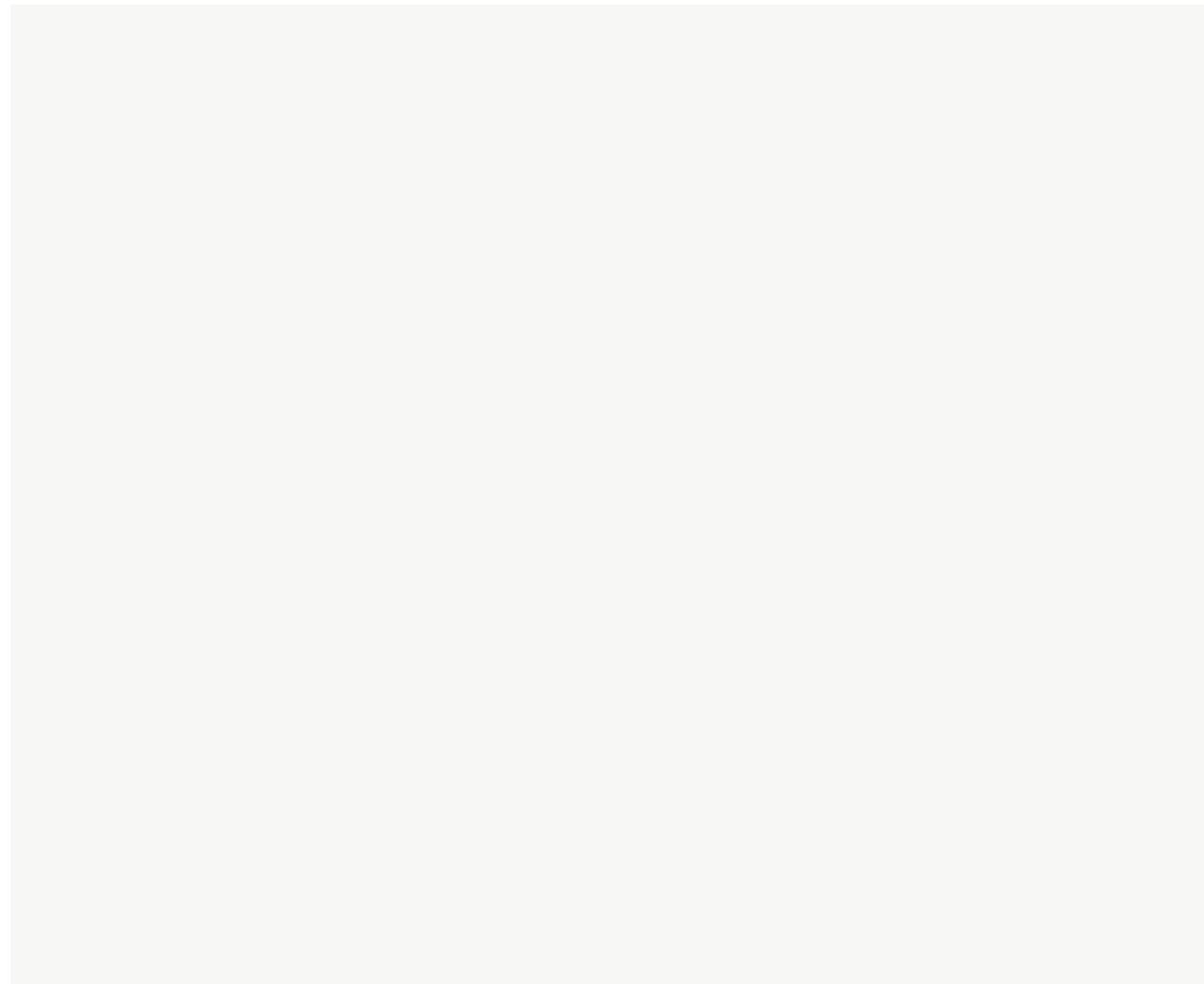
PERFORMANCE ANALYSIS: KEY INITIATIVES AND GOALS

PHASE 1: UNDERSTAND THE DATA

Write down notes or questions during the presentation of your company's initiatives and goals.

EXAMPLE

- We had talked about creating a leadership training program last year, but it never actually got executed.
- We exceeded our revenue goal by 5% last year.
- We went out to dinner as an executive team at the beginning of the year but never did it again. We need to make this a recurring, scheduled event.



PHASE 2: ANALYZE PAST PERFORMANCE

Write down your observations, answering the following two questions.

WHAT WORKED?	WHAT DIDN'T?
EXAMPLE: We exceeded our revenue goal due to a last-minute leasing push.	EXAMPLE: We didn't implement an official leadership training program.
Categories to consider: progress, processes, technology, communication, oversights, capacity, results	

PHASE 3: STATE FUTURE INTENTIONS

Use your past to inform your future.

WHAT WILL YOU KEEP DOING?	
	EXAMPLE: Quarterly team building events..

WHAT WILL YOU CHANGE MOVING FORWARD?	
	EXAMPLE: Create a flexible work option for full-time employees to come to the office 3-4 days a week.

Rank your intentions about what you'll keep or change in order of highest potential impact using the left column above.



CONCLUSION

1. What were your biggest takeaways from this exercise?

2. What makes you hopeful for the future?



STEP 3:
Envision the Future

INTRODUCTION

Your vision script is a three-part document. It includes:

- Your **Mission and Values** will describe *who you are*.
- Your **Current Reality** will describe *where you are*.
- Your **Future Reality** will describe *where you're going*.

To build your vision script, you'll walk through four stages.

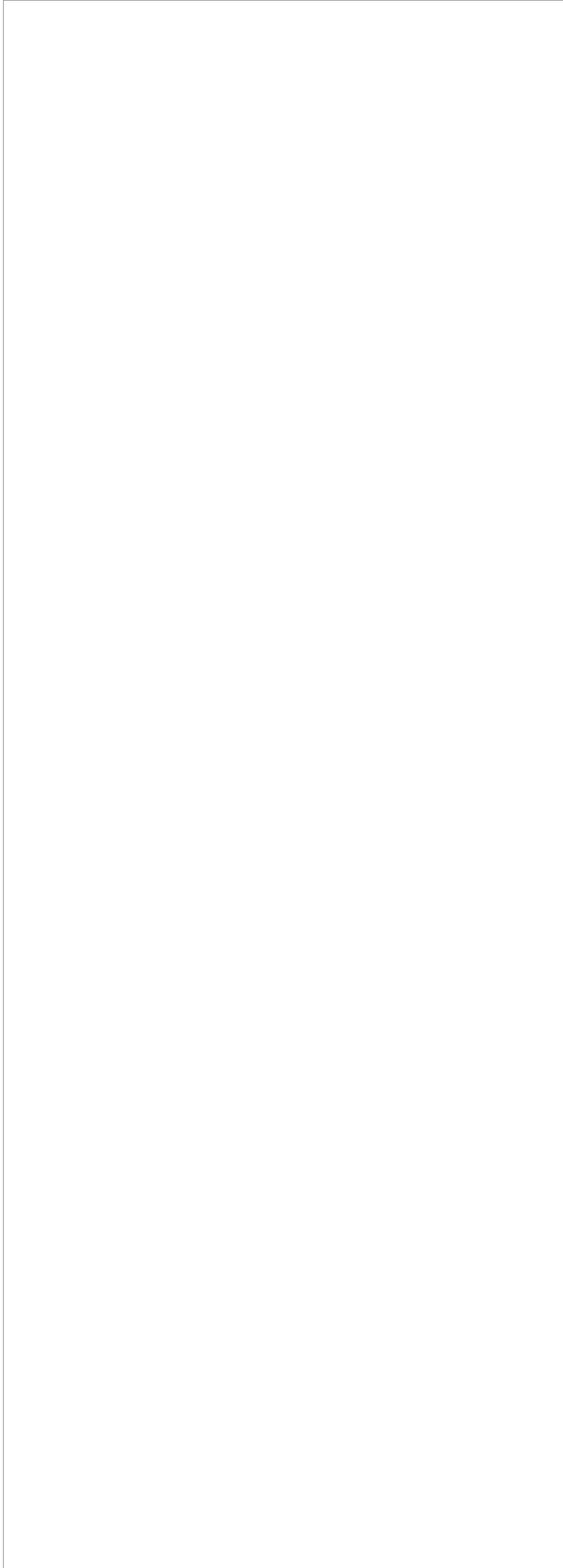
STAGE 1: FINALIZE MISSION AND VALUES | PAGE 97-98

Even though you've done an initial revision earlier in the Strategic Design process, now it's time for a final look. After this stage is complete, you will consider your mission and values final for the next twelve months.

STAGE 2: FINALIZE CURRENT REALITY | PAGE 99-100

At the beginning of the Strategic Design process, you delegated the compilation of your current reality to the people with the greatest insight into your products, programs, services, and stakeholders, and tasked a central individual to





compile these updates into a single document.

Now, you'll revisit the information they've provided, making updates as necessary.

STAGE 3: ENVISION FUTURE REALITY | PAGE 101–102

Finally, it's time to stand in the future and describe what you see. Your future reality will share the same structure as your current reality. It will meet four criteria:

CRITERION 1

It describes a 3-year horizon. It's written as though you're describing your present 3 years from now.

CRITERION 2

It involves substantial increase. It feels risky.

CRITERION 3

It requires whole-company focus. No one department can handle it alone. Everyone must pitch in.

CRITERION 4

It explains what, not how. Vision is the destination, not the route.

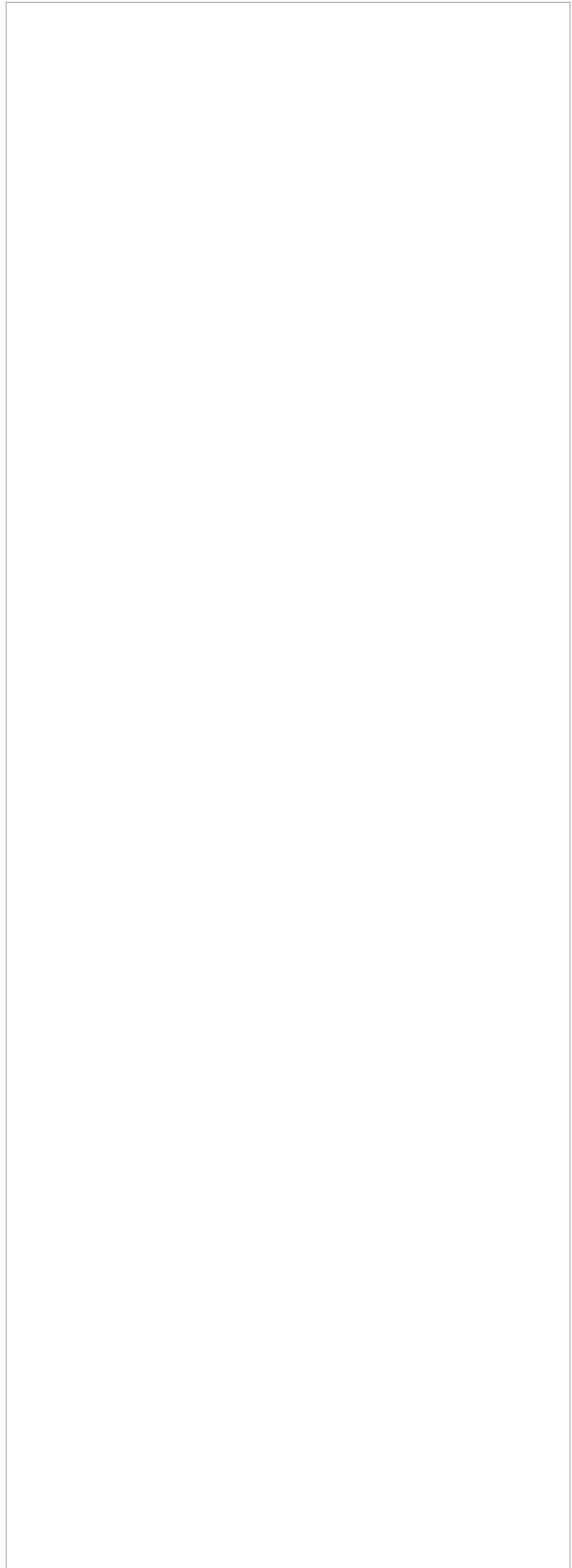
Once you've envisioned your future reality, you're ready for the final stage

STAGE 4: PUT THE PIECES TOGETHER

Once the parts of your vision script are complete, it's time to compile them into a single document. First, copy-paste your mission and values. Next, copy-paste your current reality. Finally, copy-paste your future reality.

The final result should be modeled after page 103-107

Once you've walked through all four stages, it's time to celebrate. You have a completed vision script!





FINALIZING MISSION AND VALUES

You should have collected all pieces of your mission and values and current reality during **Step 1: Establish Strategic Context**. If you need to access any of the templates, you'll find them below:

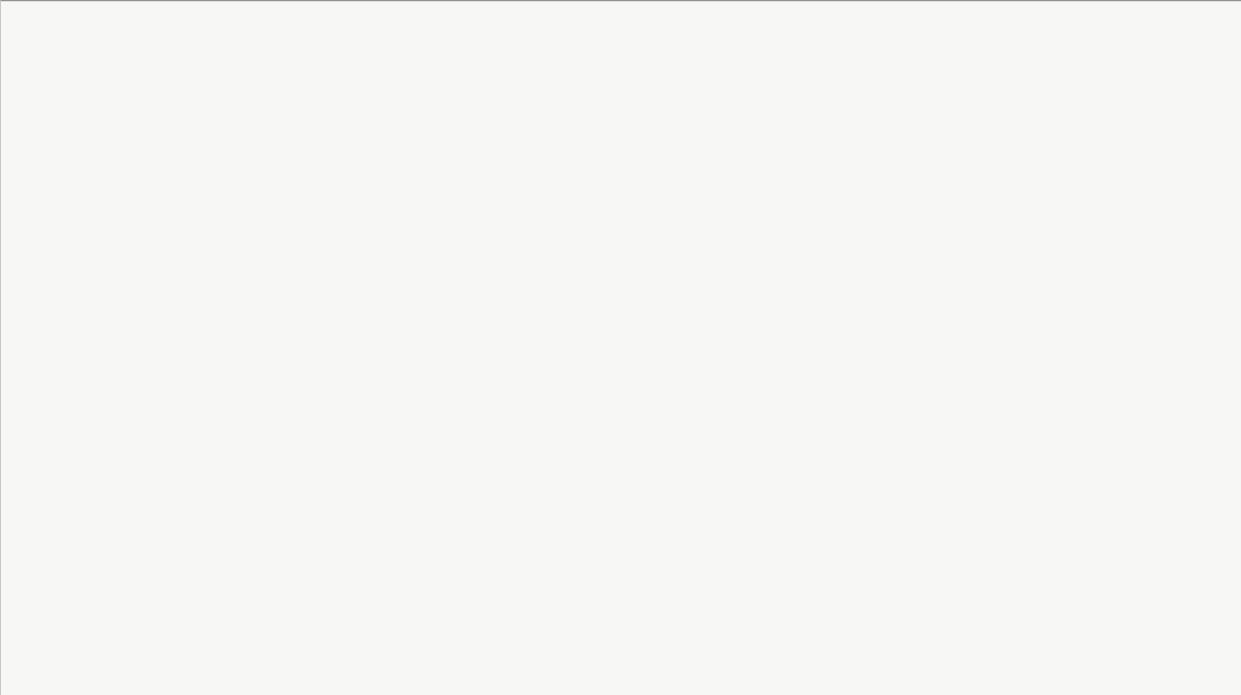
- [Template: Mission and Values](#)
- [Template: Product Details Form](#)
- [Template: Stakeholder Status](#)

MISSION AND VALUES: REVIEW
Why does your mission matter?
Why do your values matter?
Is there anything missing?

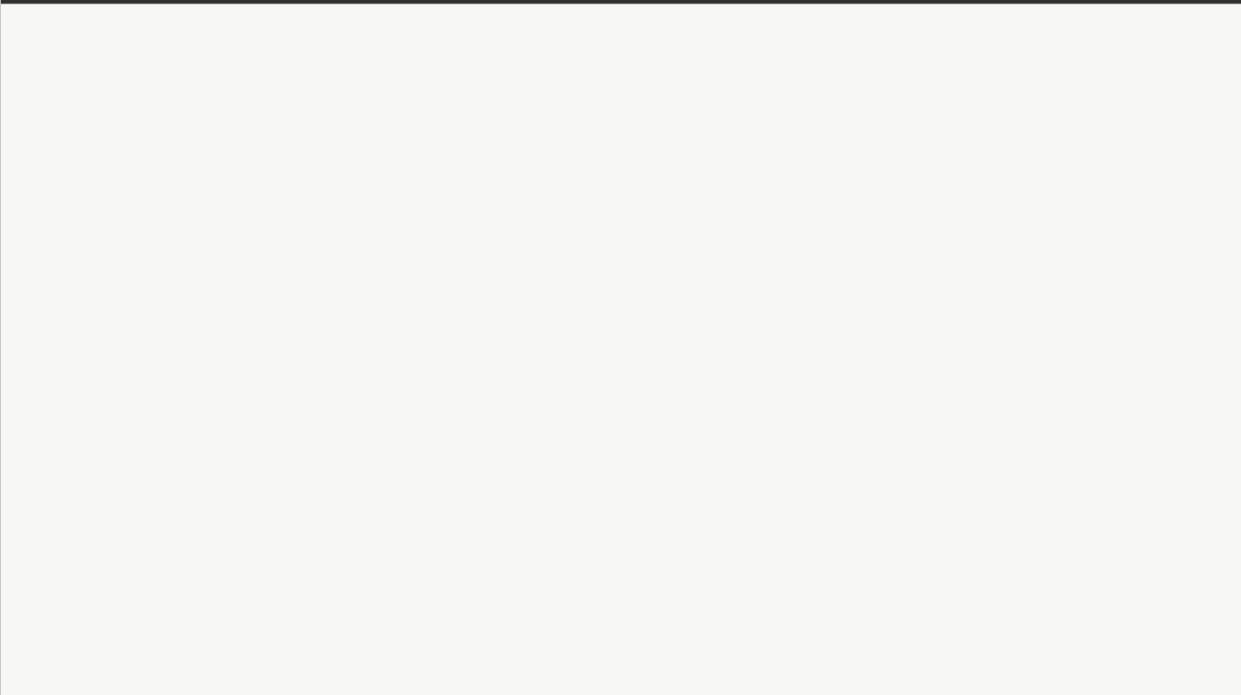


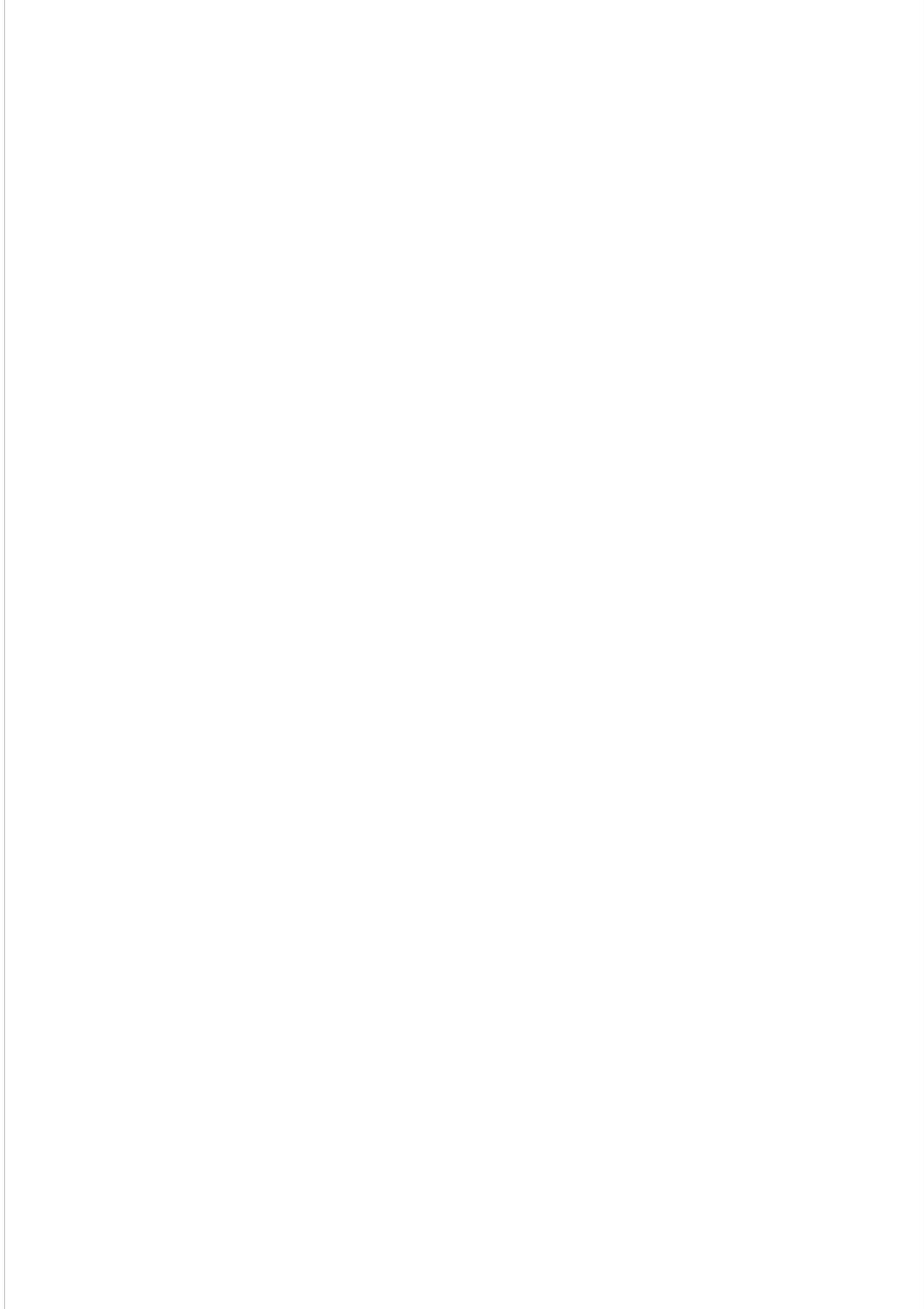
FINALIZING **CURRENT REALITY**

What stuck out to you during this readthrough?



What changes do you think should be made?



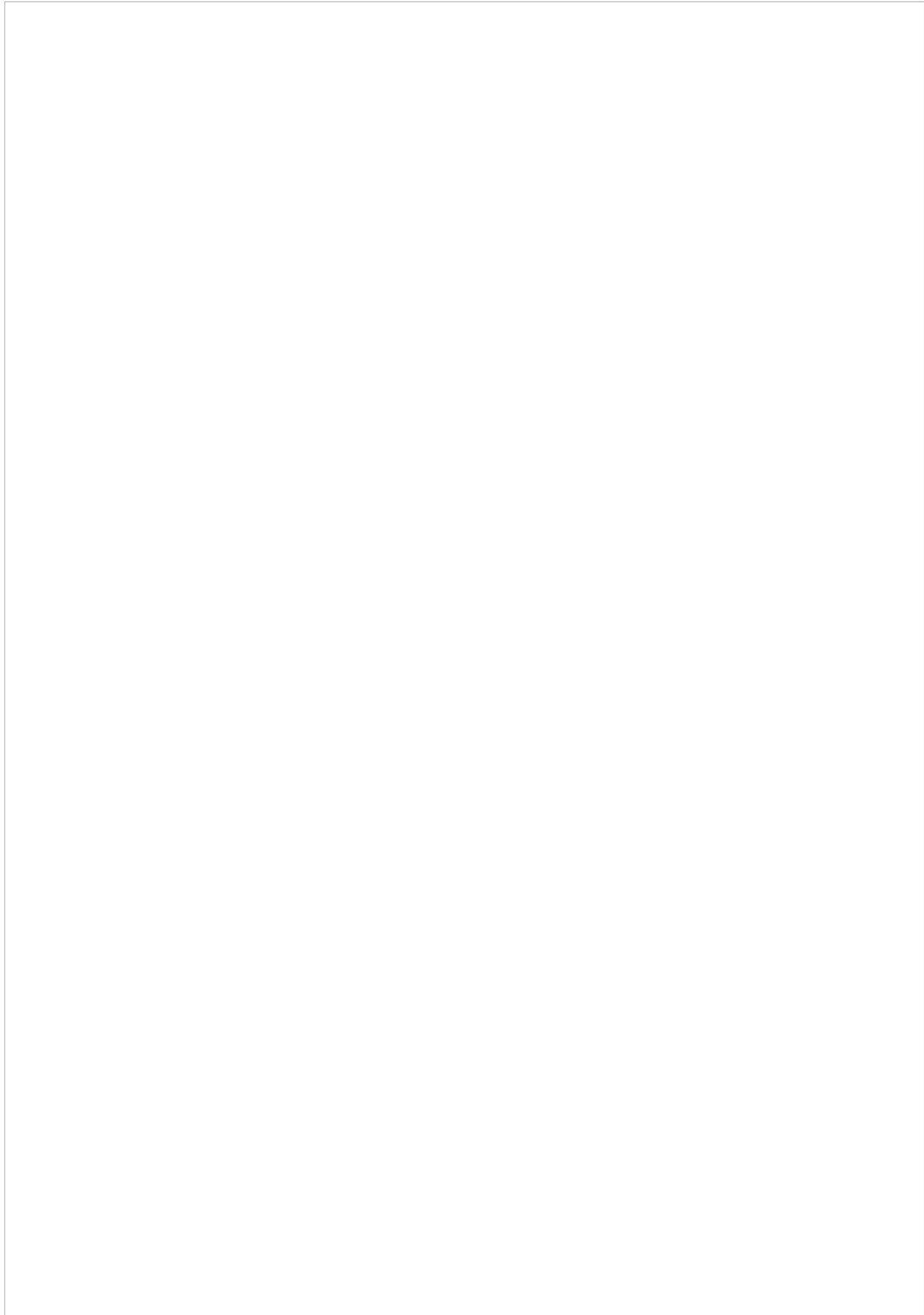


CREATING **FUTURE REALITY**

Create copies of the templates below and begin envisioning your future together

- [Template: Mission and Values](#)
- [Template: Product Details Form](#)
- [Template: Stakeholder Status](#)

What most excites you about your future reality?



PUTTING THE PIECES TOGETHER

You've now completed the three parts of a Vision Script. By finalizing your mission and values, you've defined who you are. By finalizing your current reality, you've defined where you are. By creating your future reality, you've defined where you're going.

The last step is to compile these parts into the document below. Once complete, your Vision Script should look like the Willow Run Real Estate example on the following pages.

COMPANY NAME
WHO WE ARE
MISSION
VALUES

WHERE WE ARE

RESULTS

PRODUCTS/SERVICES/PROGRAMS

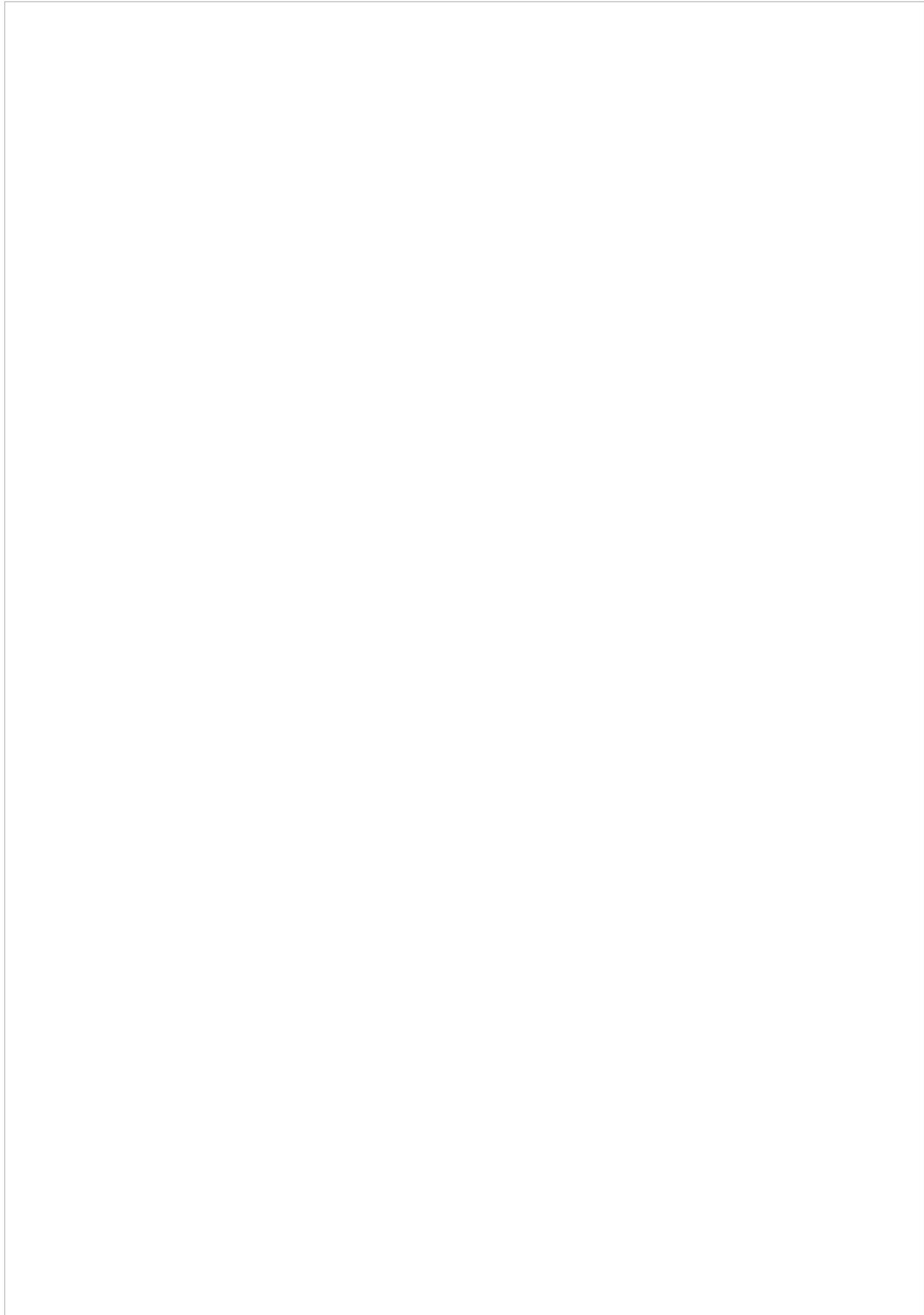
STAKEHOLDERS

WHERE WE ARE GOING

RESULTS

PRODUCTS/SERVICES/PROGRAMS

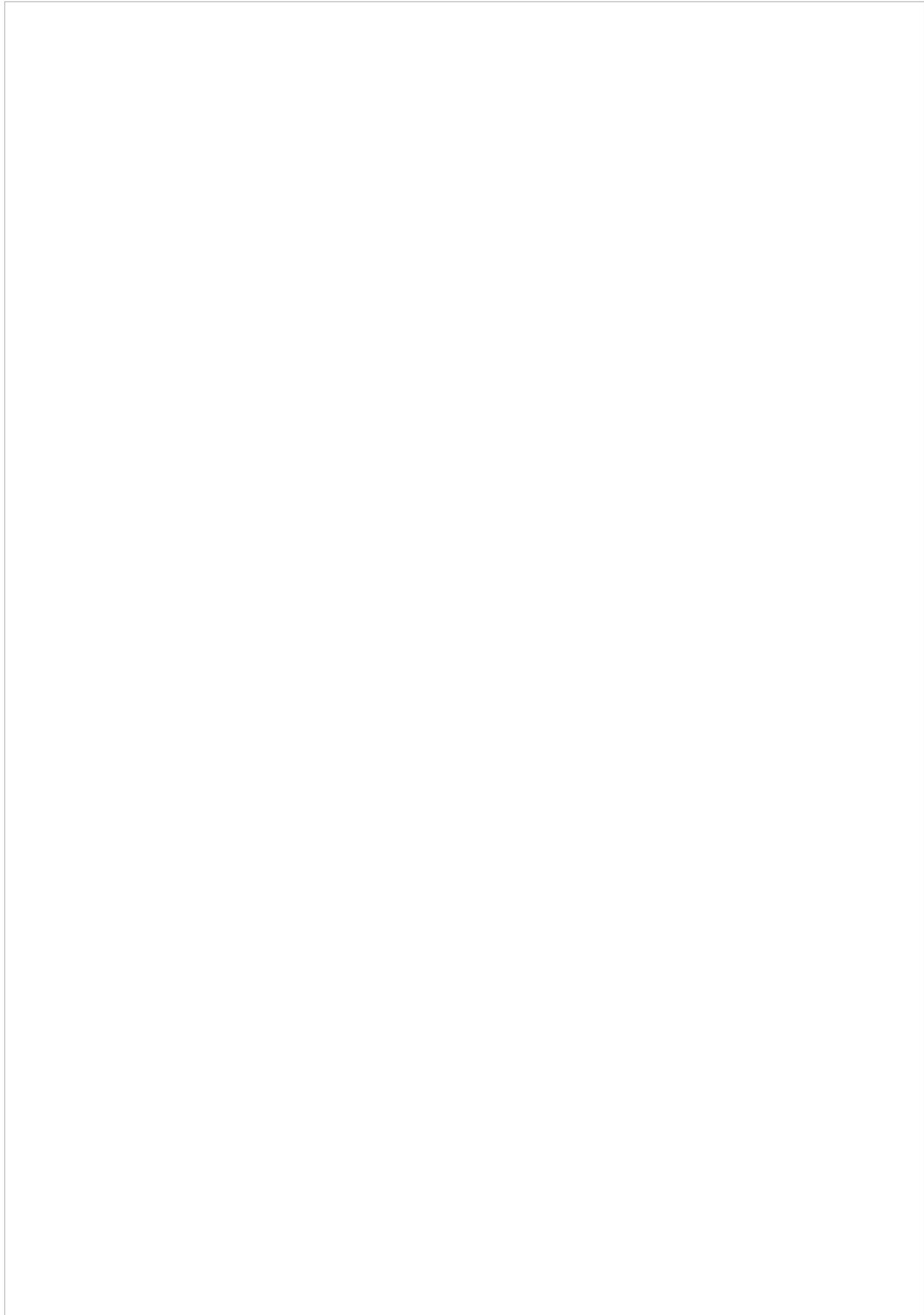
STAKEHOLDERS



CONCLUSION

1. What are your key takeaways from this process?

2. How will you keep your vision visible as you move forward?



VISION SCRIPT

SAMPLE

The following is an example of how to fill out your Vision Script.

COMPANY NAME	WILLOW RUN REAL ESTATE
WHO WE ARE	
MISSION	
<p>We are a full-service commercial real estate company. We create real estate solutions for industrial and office owners, lessors, and tenants. With our cutting-edge resources and skilled professionals, we connect our clients with their communities and give them the space and foundation to grow their businesses.</p>	
VALUES	
<ol style="list-style-type: none">1. INCLUSIVITY. We value a diverse culture where everyone belongs. Different backgrounds and experiences contribute to the strength of our team and allow us to serve our clients to the best of our ability.2. INTEGRITY. We stand for what's right. No matter how much it costs, we own our mistakes, follow through on our commitments, and operate within industry laws and guidelines.3. INITIATIVE. We don't settle. We are constantly seeking new opportunities and strategies for our clients.4. INNOVATION. We regularly look for new and better ways to do things, never settling for the status quo. We challenge ourselves to consistently learn and grow and invest in team development.5. INSIGHT. We intentionally stay up-to-date on current industry trends and technology, which ensures we are always prepared for what comes next.	

WHERE WE ARE

RESULTS

We generated \$28.4 million in revenue and \$3.7 million in EBITDA (13%).¹

PRODUCTS/SERVICES/PROGRAMS

INVESTMENTS/SALES

DESCRIPTION	We represent several strong investment clients, which leads to business across all our service platforms. We offer seller and buyer services for investors and individual building owners.
WHY WE'RE EXCITED	We get most of our business word-of-mouth, because our clients are satisfied with our negotiations and how easy we make the selling and buying processes. We have a strong team that is continuing to grow this department. Right now this is our fastest-growing service. We grew 20% over the previous year and have added two new agents to this department. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors
SCOPE	2.5M square feet industrial; 3.8 M office
REVENUE	\$9.9M
PROFIT	\$1.3M
<h4>LEASING</h4>	
DESCRIPTION	We offer leasing services to our investment clients, which includes landlord representation and tenant representation.
WHY WE'RE EXCITED	This continues to be our most profitable service. We have decades of experience and repeat clients that contribute to the stability of our business. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors, tenants, and prospective tenants
SCOPE	18M square feet industrial, 15.4M office
REVENUE	\$11.4M
PROFIT	\$1.5M

PROPERTY MANAGEMENT	
DESCRIPTION	We offer property-management services, including on-site building maintenance, on-site and on-call security, budget management, accounting, inspections, and so on.
WHY WE'RE EXCITED	We've been able to offer full-service options to our clients for the past four years and have grown our client base significantly over that time.
CUSTOMER	Industrial and office vendors.
SCOPE	3.75M square feet industrial; 2.7M office
REVENUE	\$7.1M
PROFIT	\$925K
STAKEHOLDERS	
REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a strong, loyal team whose average tenure is 12 years. Our compensation structure is fair and incentivizes our salespeople. We balance their experience as contractors well to make everyone personally feel a part of our mission.
NUMBER	24
DEMOGRAPHICS	68% men, 32% women, 80% white, 20% people of color
POPULAR BENEFITS	Compensation and incentive plans, office space
FULL-TIME EMPLOYEES	
WHY WE'RE EXCITED	We have a hardworking, enthusiastic team who stays on top of the latest technology and trends and works collaboratively to create a well-rounded and satisfying client experience. We experience very little turnover and have a culture of initiative and excellence.
NUMBER	42
DEMOGRAPHICS	72% women, 28 % men, 65% white, 35% people of color
POPULAR BENEFITS	Career development/education funds, flexible hours/remote work, 401k matching, health insurance benefits.

WHERE WE'RE GOING

RESULTS

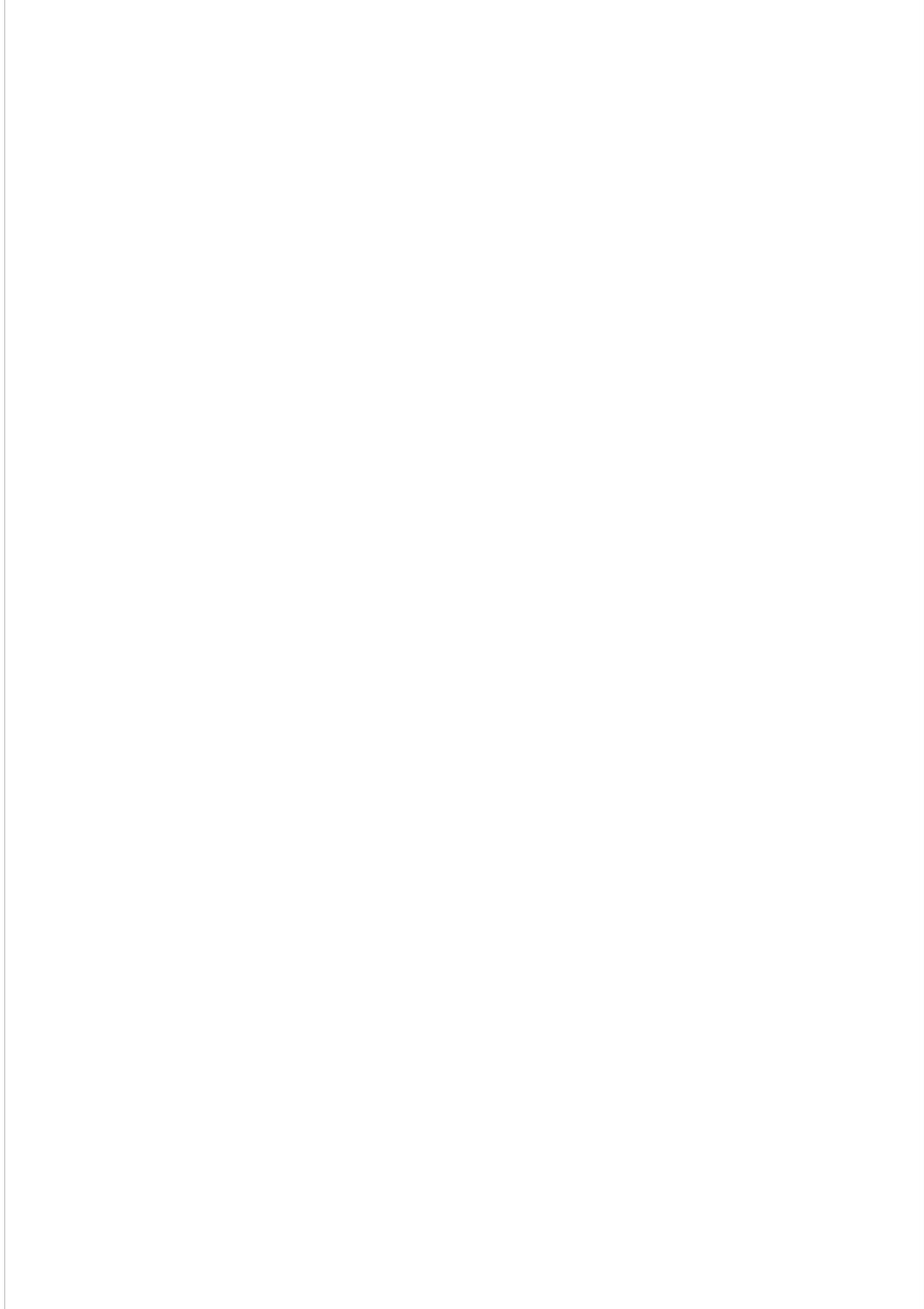
We generated \$58.9 million in revenue and \$11.7 million in EBITDA (20%).

PRODUCTS/SERVICES/PROGRAMS

INVESTMENTS/SALES

DESCRIPTION	We represent several strong investment clients, which leads to business across all our service platforms. We've added a retail team to this service.
WHY WE'RE EXCITED	We get most of our business word-of-mouth, because our clients are satisfied with our negotiations and how easy we make the selling and buying processes. Our sales are worth \$2.5M+ on average. Our team has grown to support the growth of this department. We've grown 30% every year over the past three years and have added ten new agents.
CUSTOMER	Industrial, office, and retail investors.
SCOPE	4.3M square feet industrial, 4.8M office, 1M retail
REVENUE	\$20.6M
PROFIT	\$4M
LEASING	
DESCRIPTION	We offer leasing services to our investment clients, which include landlord representation and tenant representation. With the addition of retail clients in our investments and sales department, we've also expanded our leasing client base.
WHY WE'RE EXCITED	This continues to be our most profitable service. Our renewal rates have grown by 26%. Our clients consistently refer colleagues to us for their tenant representation needs. We've developed proprietary digital tools to create an industry-leading experience for investors and prospective tenants.
CUSTOMER	Industrial, office, and retail investors, tenants, and prospective tenants.
SCOPE	22.3M square feet industrial, 19M office, 3.5M retail.
REVENUE	\$23.6M
PROFIT	\$4.7M

PROPERTY MANAGEMENT	
DESCRIPTION	We offer property-management services, including on-site building maintenance, on-site and on-call security, budget management, accounting, inspections, and so on. We have added retail to our list of services.
WHY WE'RE EXCITED	We manage every building where we represented the buyer in an investment sale. Due to our incentive program for on-site managers and engineers, we have better customer service than ever before.
CUSTOMER	Industrial, office, and retail investors.
SCOPE	4.5M square feet industrial, 3.5M office, 1.5M retail
REVENUE	\$14.7M
PROFIT	\$2.9M
STAKEHOLDERS	
REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a strong, loyal team of contractors. Our compensation structure is fair and incentivizes our salespeople. We balance their experience as contractors well to make everyone personally feel a part of our mission. We now have a sales team that focuses on the retail industry.
NUMBER	35
DEMOGRAPHICS	50% men, 50% women, 65% white, 35% people of color
POPULAR BENEFITS	Compensation and incentive plans, office space, and a variety of convenient office amenities, such as free healthy snack options, food truck visits, and cutting-edge technology
FULL-TIME EMPLOYEES	
WHY WE'RE EXCITED	We have a hardworking, enthusiastic team that stays on top of the latest technology and trends and works collaboratively to create a well-rounded and satisfying client experience. We experience very little turnover and have a culture of initiative and excellence. We now have a project management team that is skilled in retail. We also have an in-house research team.
NUMBER	52
DEMOGRAPHICS	60% women, 40% men, 50% white, 50% people of color
POPULAR BENEFITS	Career development/education funds, flexible hours/remote work, 401K matching, health insurance benefits, adoption benefits, gym memberships, and an on-site cookie machine



GROUP COACHING SESSION: THE PRACTICAL APPLICATION

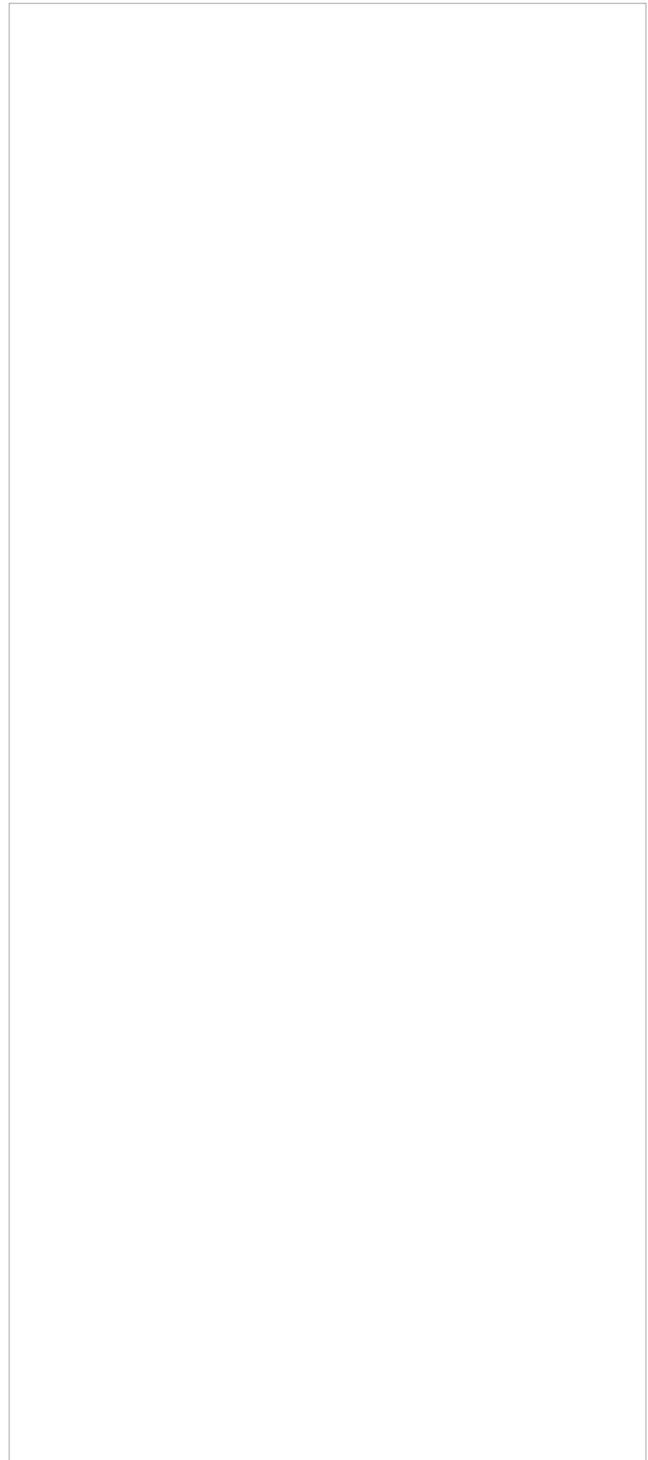
INTRODUCTION

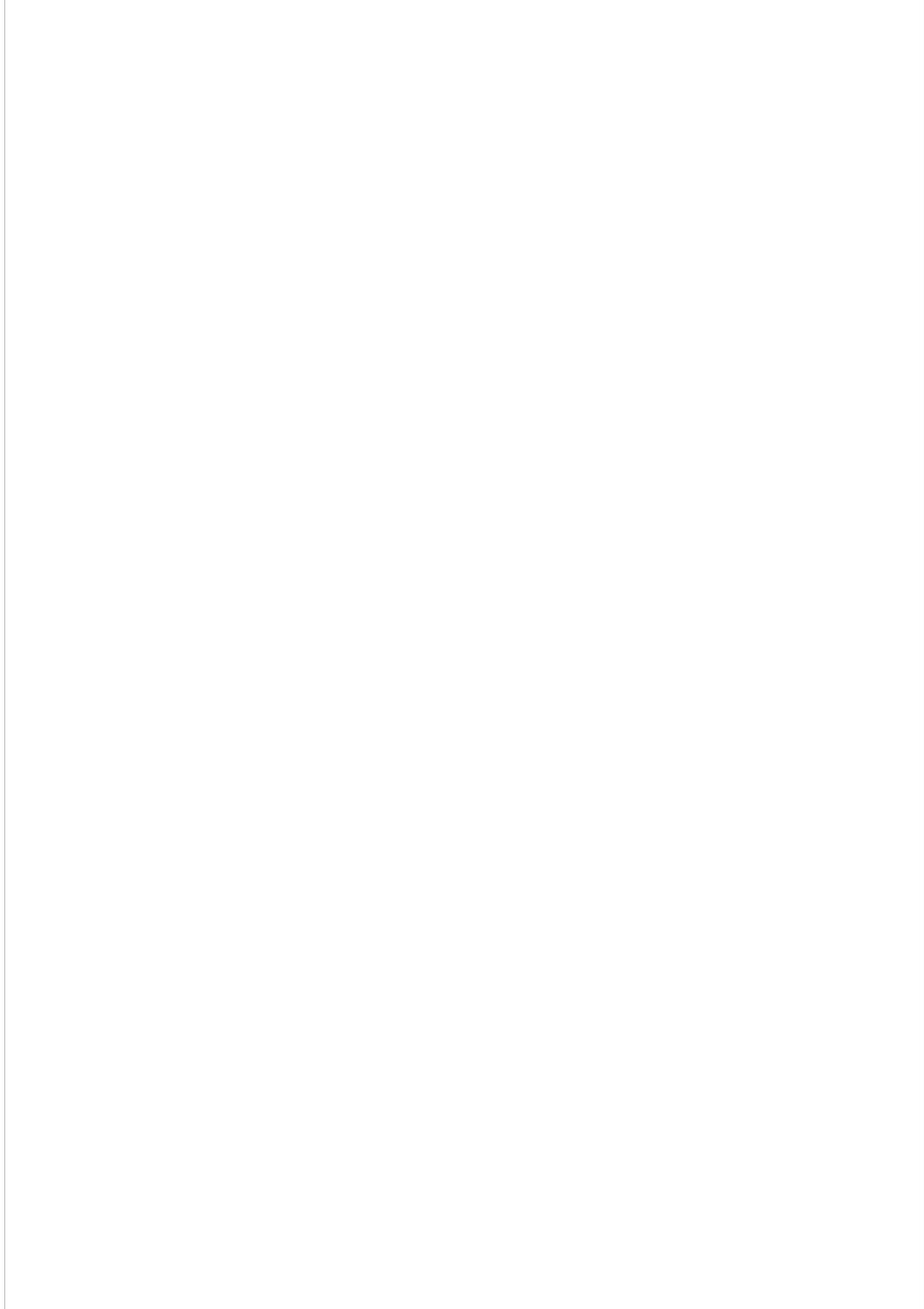
Learning isn't just knowledge acquisition. Unless you let new knowledge shape your behavior, it doesn't do any good. This afternoon is about turning the intellectual into the practical and then turning the practical into action. Let's start with a critical component of your growth and goal achievement: The Quarterly Preview.

PHASE 1: CONSIDER

EXERCISE: QUARTERLY PREVIEW HEADSTART™

Feel free to write your responses in your workbook or your Full Focus Planner—wherever makes more sense to you.





PHASE 1: CONSIDER

QUARTERLY PREVIEW HEADSTART

Step 1: My Biggest Wins | List your accomplishments from the past quarter.

Step 2: Goal Progress | Do an After Action Review of your Goal Progress over the past quarter.

How far did you get?	% COMPLETE

What worked? What didn't?

What will you keep doing?

What will you improve?

What will you start doing?

What will you stop doing?

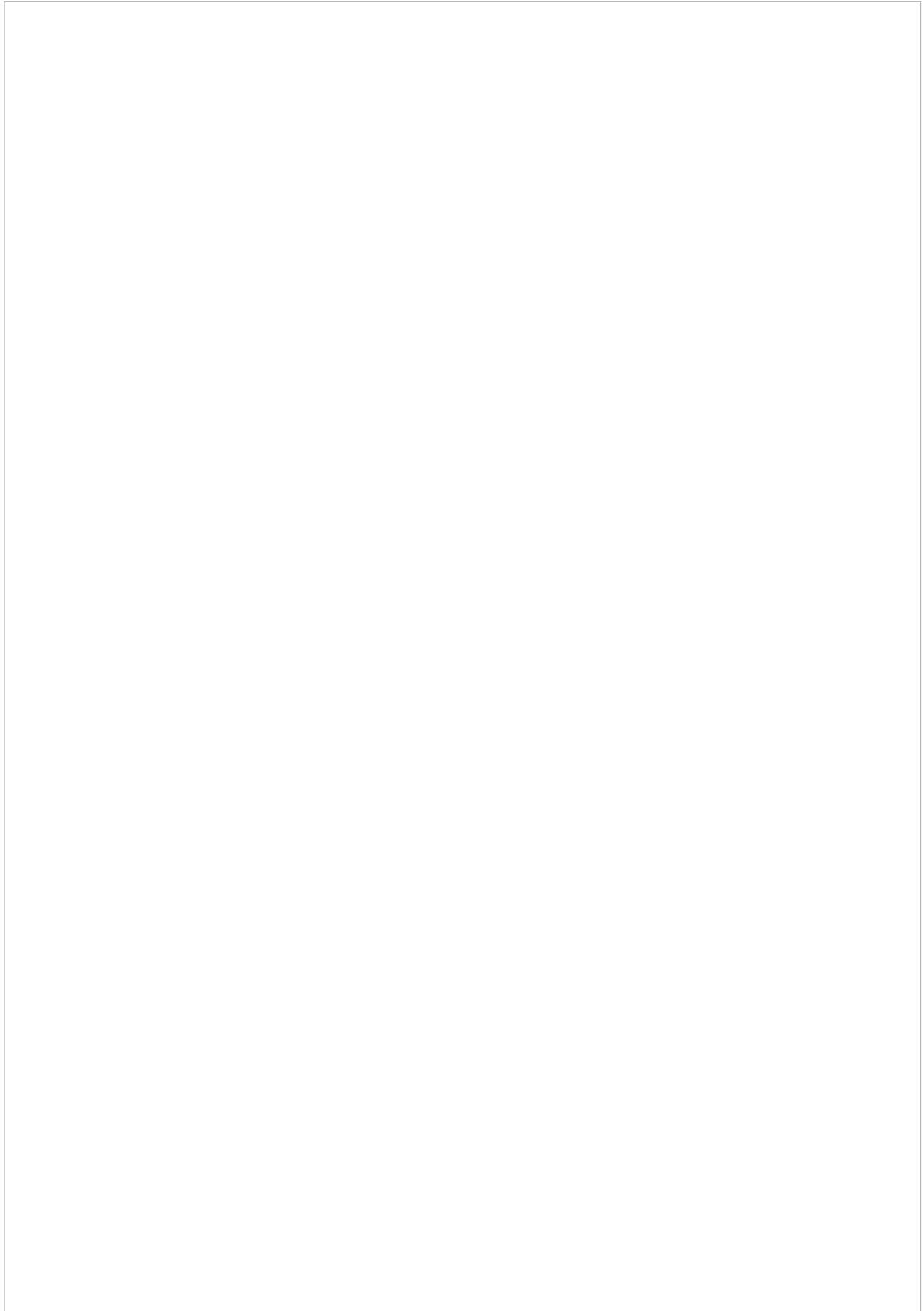
Step 3: My Biggest Challenges | Identify your current biggest challenges above by circling, starring, or highlighting in some way and/or making a list of them here.

1 _____

2 _____

3 _____

Not finished? No problem. You can finish your Quarterly Preview on your own. Take a few minutes to block out an hour or two on your calendar now.

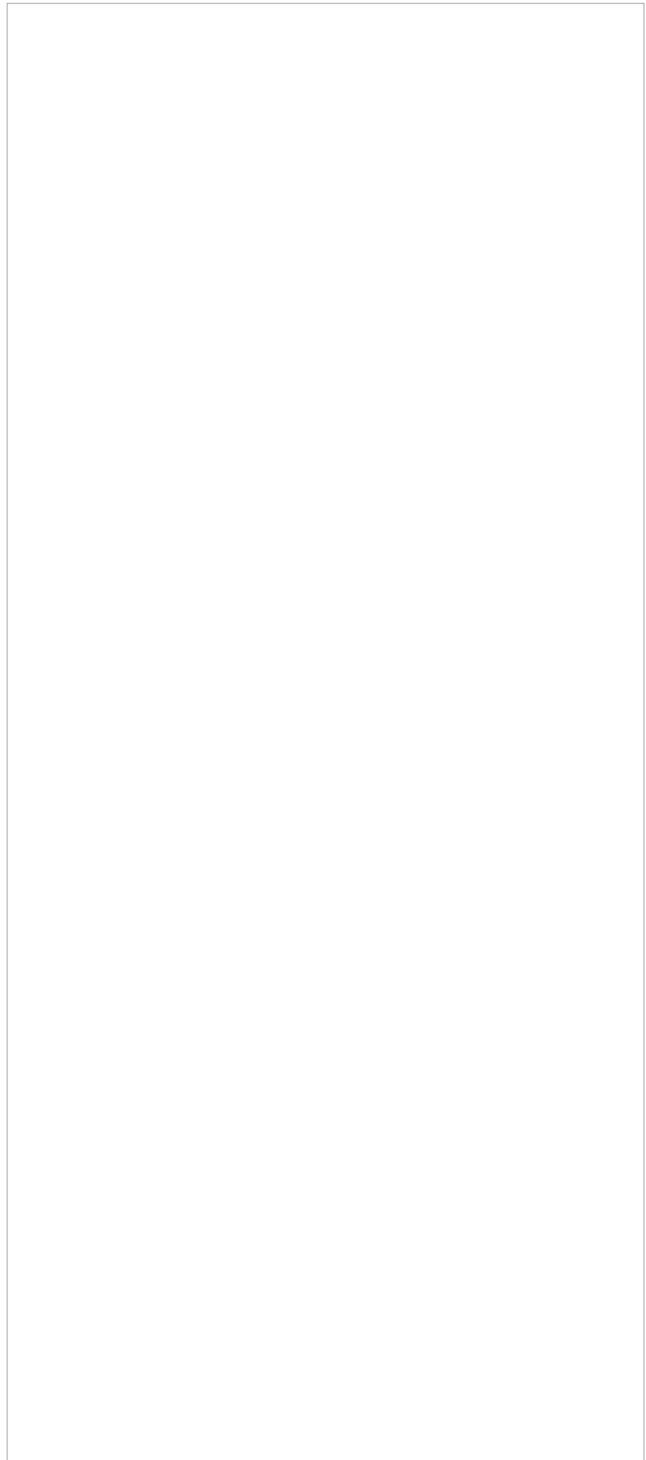


PHASE 2: COLLABORATE

You heard a lot of content today. Now, it's time to engage what you've learned. Throughout this group coaching session, you'll have the opportunity to go deeper and learn with and from your peers. Remember: Transformative coaching involves both active listening and authentic sharing. Make sure you do both.

Remember, you're on the lookout for:

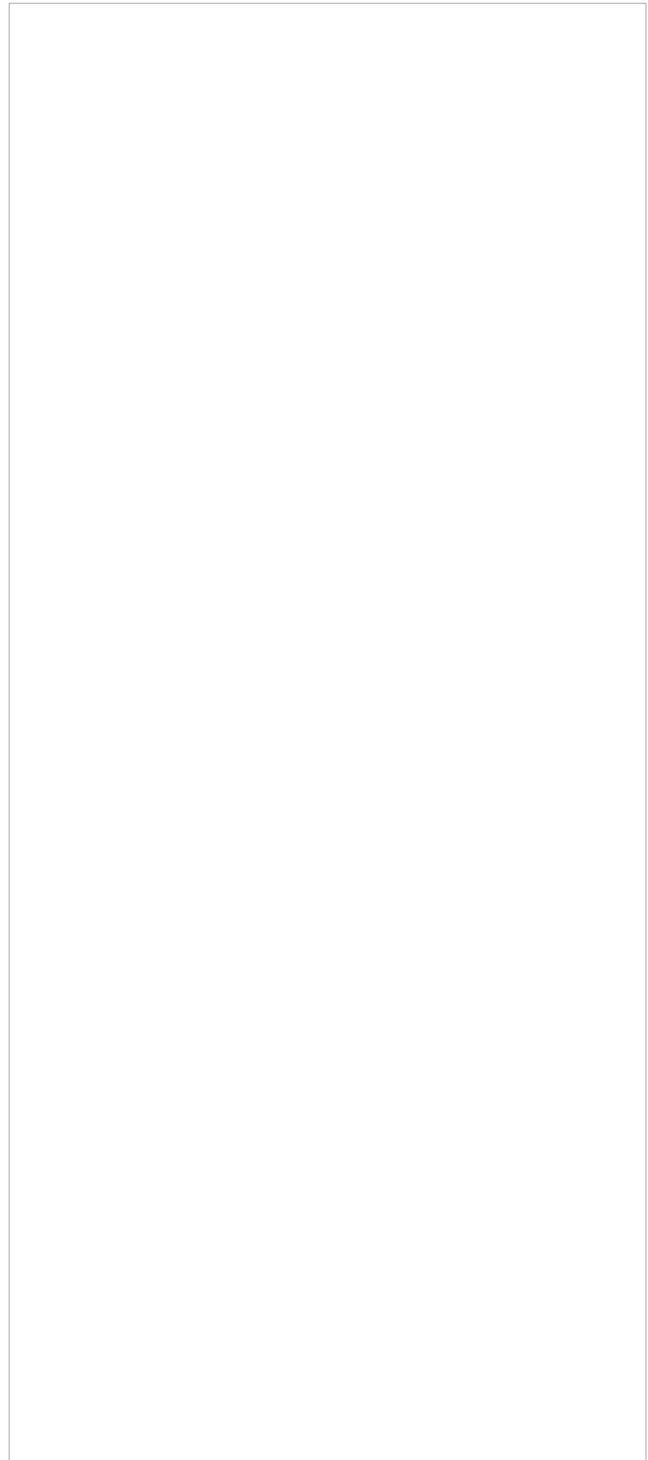
- Good questions
- Thought-provoking statements
- Insightful advice
- Actionable steps

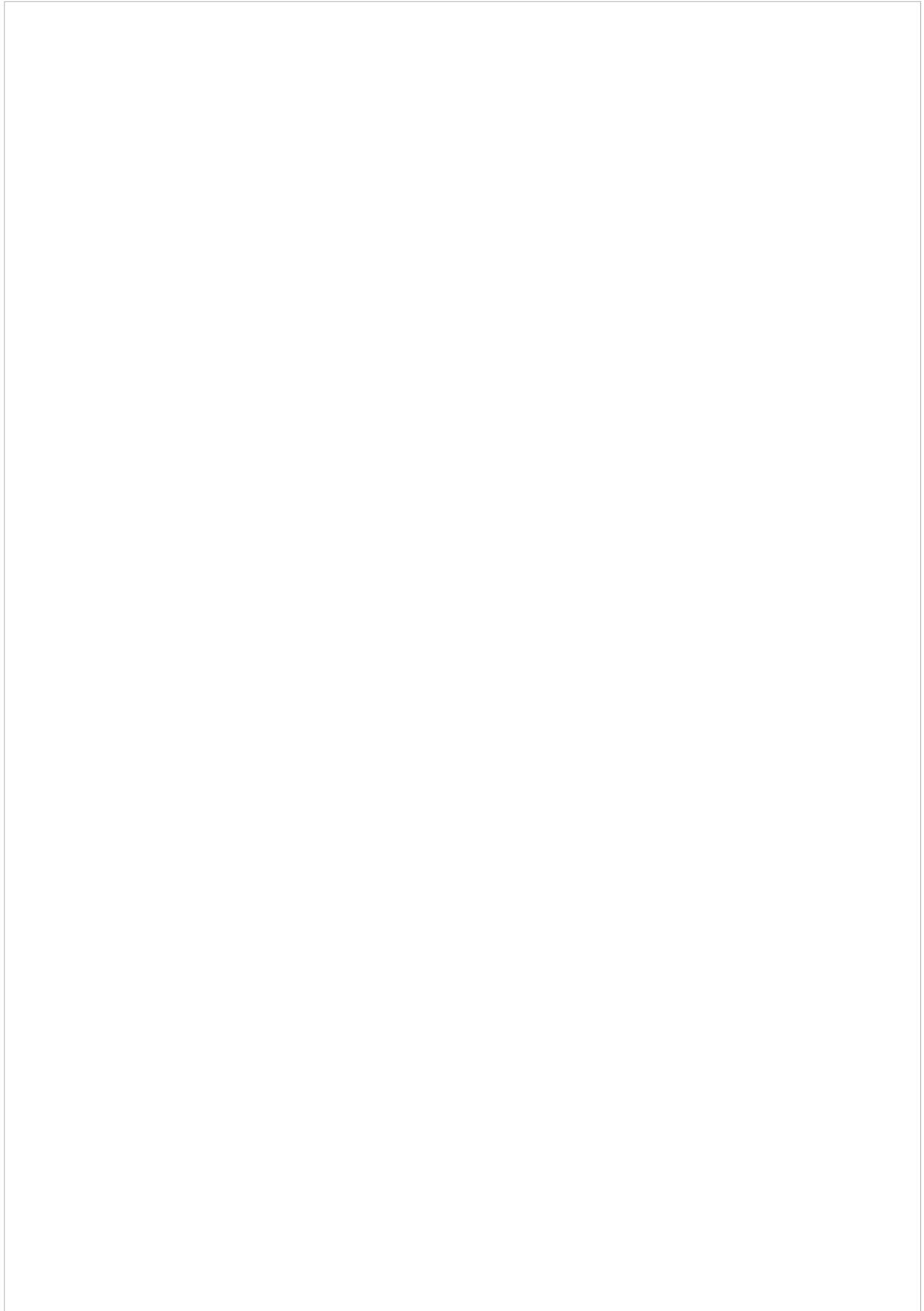


PHASE 3: COMMIT

90-DAY ACTION PLAN

Now, we want to give you the time to take what you've learned here today and create an action plan for the next 90 days. Using the 90-Day Action Plan exercise on the next pages and your Full Focus Planner, determine next steps and schedule them for your next quarter.





90-DAY ACTION PLAN



Step 1. Look over your notes from today's intensive—including the content, individual activities, and group discussions—and briefly document any insights, breakthroughs, or other important information here.

[Empty light gray rectangular area for Step 1 notes]



Step 2. Take some time to connect what you learned today to your life and business. Here are two questions to get you started.

How might the insights or breakthroughs I experienced today help solve a problem, relieve some friction, and/or boost my growth and momentum?

[Empty light gray rectangular area for Step 2 response]

What is at stake if I don't take action and nothing changes?



Step 3. Determine the details of your next steps. To get clear on your next steps, consider the items below:

- CALENDAR:** What do I need to schedule?
- DELEGATION:** What can only I do? What do I need to delegate?
- COLLABORATION:** Who on my team should I enlist to help and/or offer input (i.e. an Executive Assistant, Director of HR, mastermind group, etc.)?
- COMMUNICATION:** What do I need to communicate? And to whom do I need to communicate it (my team, the CEO, our clients, my spouse, etc.)?

Over the next 90 days, what action steps will I take to make progress on what I learned?

<input type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	3
<input type="radio"/>	4
<input type="radio"/>	5
<input type="radio"/>	6



Step 4. Referring to your insights here, schedule your next steps in your planner and communicate with your executive assistant to get everything on your company calendar.

PHASES 4 & 5: **ACCOUNTABILITIES AND IMPLEMENTATION**

PHASE 4: COMMIT QUARTERLY ACCOUNTABILITIES

Finally, review your goals. They should be written at the front of your calendar.

As you consider your goals and your learning from today, what are the highest-leverage tasks you need to accomplish before your next intensive?

PHASE 5: DO SCHEDULING IMPLEMENTATION

Remember: what gets scheduled gets done. Write your next steps in your planner and communicate with your executive assistant to get everything on your company calendar.

