

# WINNING STRATEGY

## LIVING WATER CONSULTING

Build A Business That Thrives With You—Doesn't Depend On You





**LIVING WATER**  
CONSULTING



Electric Works | DANCER

8 to Great



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# WHY LIVING WATER



**We're a family-operated business based in the Midwest.** We believe when people matter the most, organizations are healthier, strategies are smarter, and the impact is greater.

**Our focus is your gain.** Our goal is that your business is profitable, sustainable, and is a place where your employees are fulfilled, using their unique God-given talents and skills. We help you with clarity and focus towards your vision.

**We value relationships.** When we're partnered together, we don't work with your direct competitors, because we believe that a handshake is more than just ceremonial.

**We know the value we can bring.** We have the experience in house with great resumes in multiple industries. We believe that all companies have a need for a mentor and accountability to drive them to the next level.



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[consultlivingwater.com](http://consultlivingwater.com)



# THE DREAM: A COMPANY THAT OPERATES ON ITS OWN

Maybe you feel that you're a lifetime away from a company that operates on its own? You might have seen other companies over the years that seemed to run so smoothly, your jaw dropped thinking: How do they run like a well-oiled machine? Where the heck did they find those people? What's their secret sauce? Maybe you think you could never get there, or maybe you even tried, but it felt like you were pushing a boulder up a hill. At some point, you've possibly had those moments that seemed like you did get there, then within that same week, you were dragging your hands down your face in stress.

You want off the chaos roller coaster. You've figured out how to make some money, you've spent the long nights working on the next project or stayed up late worrying about how to pay employees on Friday. Now, years later, you have confidence that you can keep the lights on, but you want to create a better version of your business. You want a business where you're in control.

You've probably created the ideal business in your head. Maybe for you it's having a great team that runs the company. Maybe it's having an amazing service or product so dialed in that customers don't call anyone else. Maybe you want to be more efficient, run like clockwork. Most likely, you want all of that. It all sounds good, and it's not out of reach.



## FROM OUR FOUNDER



***“YOU DON’T NEED  
A LIFETIME TO  
BUILD A SELF-  
SUSTAINING  
BUSINESS—***

***ONE THAT THRIVES  
WITH YOU BUT  
DOESN’T DEPEND  
ON YOU. FREEDOM  
COMES WHEN YOU  
INVEST IN PEOPLE,  
LEAD WITH  
PURPOSE, AND  
STREAMLINE YOUR  
OPERATIONS.”***

# RAISE YOUR LEADERSHIP TO NEW HEIGHTS

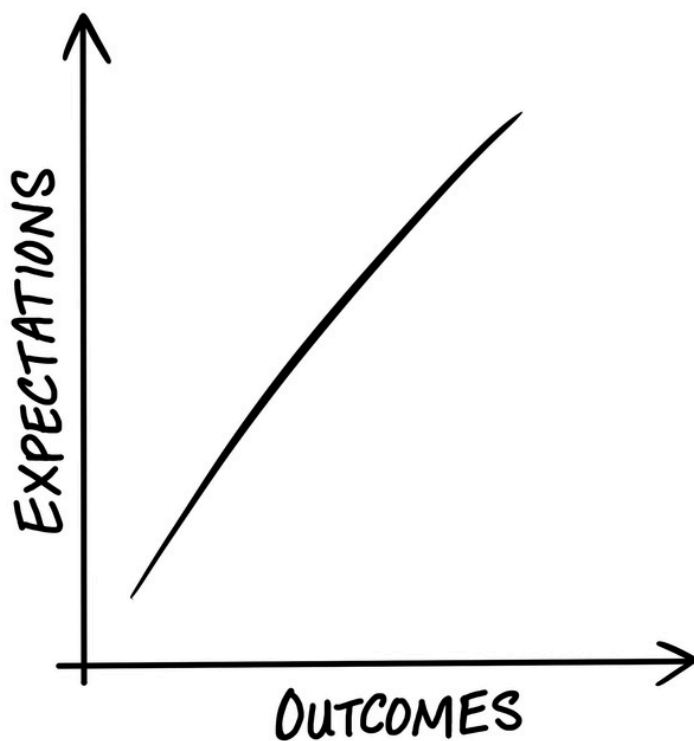
Our clients typically have built their businesses off hard work and grit. Most have anywhere from ten to hundreds of employees. They started doing what they loved or what was in demand, and before they knew it, they were making millions in revenue.

If you're like them, you found yourself saying, "There has to be a better way this time around." You're done pushing as fast as you can and seeing what sticks. This next chapter of your business, you want better. I wouldn't put this in front of you without first testing and refining it through true application with many businesses like yours.

This is different from what you've read before; I have clearly illustrated concepts (I literally sketched drawings) in simple ways that help you apply it faster. You'll have a standard to take your leadership to the next level and a practical way to implement it and start today.

There's only one thing I ask as you read further; I need you to believe you can become that leader you've always dreamed of. It is possible. But you must believe it can happen. This is called the Pygmalion effect. (That's pig-male-e-on, if you need a handicap like me.) It's a psychological phenomenon that describes how expectations can impact performance. It's based on the idea that people tend to work harder to meet high expectations. Doing the same thing that you've done for the last ten years, is not going to get you the results you want for the next ten.

The leaders that we've helped are not smarter or harder working than you, they have simply raised their expectations to new heights. They have implemented our 8 to Great framework and consistently chose to stick with it. Their outcomes have compounded over time, because they raised their expectations and believed it was possible.



A handwritten signature in black ink, appearing to read 'H. Tash'.

HARRISON TASH

**FOUNDER OF  
LIVING WATER**



DANCER | Fort Wayne, IN



# 8 TO GREAT

THE FRAMEWORK OF THRIVING BUSINESSES  
ADOPTED BY HEALTHY LEADERS

The 8 to Great is our holistic framework forged from observations and refined with real businesses just like yours through our consulting work. We collected timeless principles and worked through real life applications of how each component fuels a self-sustaining business and truly gives you a unique edge. Let's break the model down a bit... The first four components are:

1. Healthy Leaders
2. Vision
3. Purpose Driven
4. Values

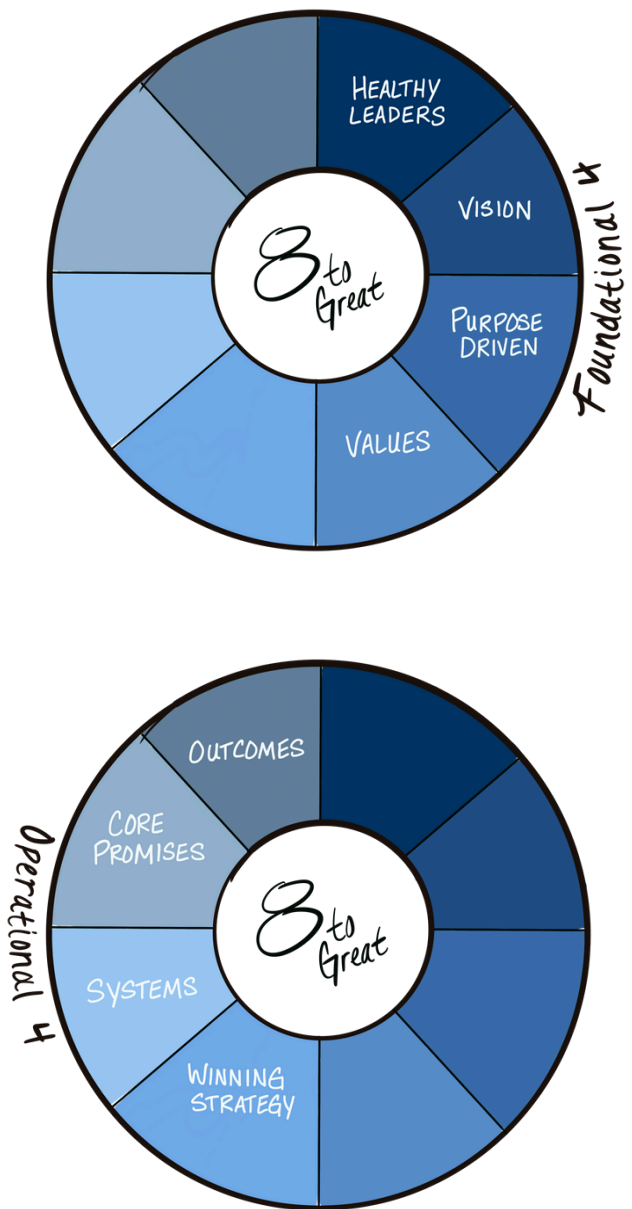
We call these the “Foundational Four,” because the second four are unsustainable if these are not integrated into the fabric of your business. To integrate the Foundational Four well, you must first believe your organization is a living, breathing organism. It needs nourished daily. Starving the organization of the Foundational Four will inevitably choke the rest of your company.

The second four are the “Operational Four”:

1. Winning Strategy
2. Systems
3. Core Promises
4. Outcomes

The Operational Four are strengthened by the Foundational Four. Life is given to the operation based on the strength of the foundation.

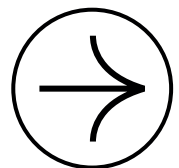
Let's give this some meat right away to help you with why this matters... we should all understand that it isn't only about the “who,” but also the “how.” It's as much about the people as it is about the process. This tricky balance is what we all have struggled with at some point in our business and leadership.



SKETCHES BY HARRISON TASH

## CULTURE AS THE BY-PRODUCT

We're not just talking about your company—we're talking about something deeper. The companies that we wish to emulate likely also have something that's hard to put your finger on. Sometimes, we call this culture.





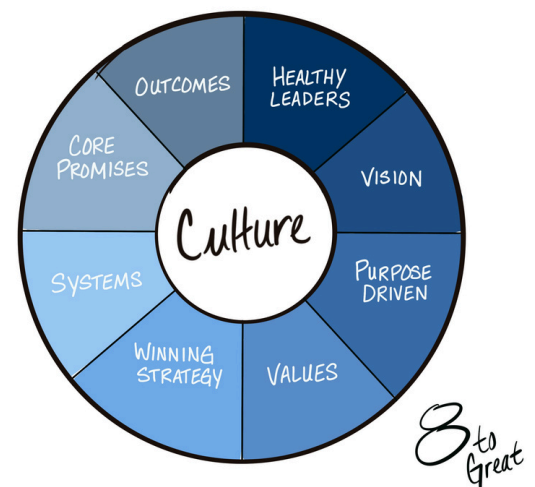
# CULTURE MATTERS

**Culture is the invisible force that either supercharges your growth or quietly pulls you under.**



There's a vital part of the 8 to Great that can be easy to overlook: culture. Though it's not one of the eight components, culture is the by-product of how and why you integrate them into your business. Culture is not hard to see but can be hard to define. Without a culture that attracts people, you're just another company in a sea of competitors. The sharks are real, and if you're not careful, the big sharks will take you out.

Good news though: thriving companies have something that sets them apart—they are different. They are not competing for the bottom feeders, they have a culture that people love and customers want more of. Healthy Leaders create thriving cultures. Not "bean bag chairs in the break room" type of culture, but one that is fueled on performance, likes to create and do, and where people share a vision and enjoy working next to each other. Culture is the invisible force that either supercharges your growth or quietly pulls you under.



# STORY OF THE UNHEALTHY

“He’s the kind of manager that every business dreams of.”

Have you ever had that unstoppable high performer in your business? The one who seems to push through obstacles, and deliver results? We’ve seen many over the years, but one in particular we remember—we’ll call him Mike. He was a senior level employee with 15 years under his belt. Mike had a lot of knowledge, and the president loved him. He was relentless, the kind of guy who thrived on pressure and never backed down from a challenge. First in, last out. He played a key role in launching new initiatives that brought in big revenue. If something needed fixed, Mike was on it. If a project was failing, he’d turn it around. To those watching from the outside, he looked like the perfect leader—unstoppable, results-driven, a force to be reckoned with.

But beneath the surface, there was a different story. His team admired his work ethic but felt invisible in his shadow. They didn’t feel heard, didn’t feel valued. Mike rarely checked in unless it was about a deadline or deliverable. Meetings were one way, where Mike talked and everyone else listened. When his team spoke up, their ideas rarely gained traction. His peers barely noticed the problem because, on paper, Mike was a superstar. Even the leadership team, whether knowingly or not, seemed to ignore the cracks forming in his team.

## BREAK THE CYCLE

The strangest part? This isn’t an isolated story. Over lunch one day, a friend from another company told me almost the exact same experience—different name, same problem. We’ve heard many more stories just like it from leaders over the years. Turns out, this isn’t simply a story about a high performer that doesn’t know how to lead, it’s a lesson about extremes. On one side, it’s the bulldozer, on another, the data-obsessor, or even the people-using politician. Leading is more than doing or making progress, but often we get distracted with the big “shiny” numbers and think we’re succeeding.

There’s something more to leadership than that. Leadership isn’t just about profits, making decisions, driving results, or keeping the business afloat. Too many leaders are stuck in survival mode, reacting to daily chaos rather than shaping the future. They put out fires, manage crises, and push through each day with grit.

But real leadership isn’t about managing the urgent—it’s about building something that lasts. It takes a Winning Strategy.

A real story and common problem.

***“Too many leaders are stuck in survival mode, reacting to daily chaos rather than shaping the future.***

***They put out fires, manage crises, and push through each day with grit.***

***But real leadership isn’t about managing the urgent—it’s about building something that lasts. It takes a Winning Strategy”***



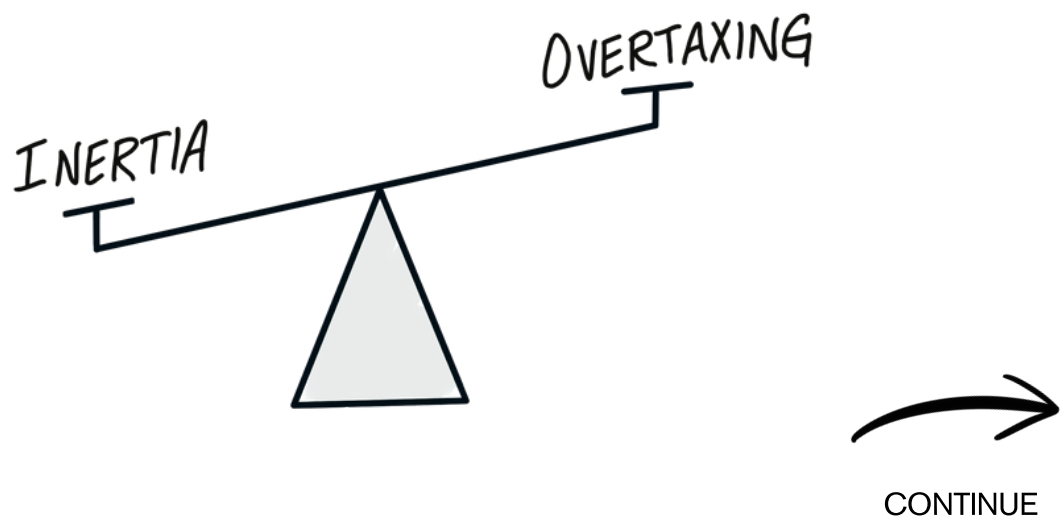
# THE PROCESS IS YOUR STRATEGY

## INERTIA OR OVERTAXING

In business, as in life, decisions often carry unknown outcomes. Leaders are forced to weigh incomplete information, conflicting priorities, and the consequences of their choices. As leaders, we sometimes face the need to make decisions we'd rather avoid, knowing the future remains uncertain. We might fear the unknown and decide not to move until we have "all" the information, leading to inertia. Strategy involves navigating the unknown and making the best-informed choices for the greater good. For some businesses, these choices require not taking on too much work that inevitably leads to destruction. For others, it is putting up a fight against your competitor and creating a new product. While not every decision will lead to clear victories, the act of choosing—of moving forward despite uncertainty—is what defines us.

Strategy is often used in business to sound smart or important... it's like saying "according to research." If all else fails, just say "Our strategy is..." and people will most likely think you have a decent plan. We've observed a lot of businesses call something strategy, when really it was a "to-do" list or something that made them feel good. Benjamin Franklin said, "Success is the residue of planning." Planning requires us to make the best predictions with the best information we have available.

Winning Strategy is the art of planning, executing, and moving toward your vision with the right information and people. It is the process of planning internally, just as much as externally. It's the weighted balance of people and process; and ensuring your products and services are dialed in to the best of your ability. People being your employees and customers, and processes including everything from business development to customer satisfaction.





# Winning Strategy is the art of planning, executing, and moving toward your vision with the right information and people.

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When we start working with companies on their Winning Strategy, We often see leaders wanting to “bite off” more than they can chew, or what we call overtaxing. This can probably be explained for many reasons, like ambition, pride, unrealistic foresight, lack of understanding, and much more. It's not uncommon to hear a three-year plan being rolled into one year. We often have a problem with consuming more than we can handle. Our eyes are bigger than our stomachs and many of us could agree that doing too much will often lead to apathy. We might think it's noble, but it won't be long before we crash, burn out, and or nothing gets done.

Or maybe, on the flip side, its inertia, paralyzed by the fear of what will happen. We might fear the unknown and decide not to move until we have “all” the information. None of us will ever have “all” the information. The “unknown” of what's on the other side of your choices is an abyss, it will suck you in and never let you out; it's your choice... literally, it's your choice.

Balancing these two extremes means that we need to focus, create stretching goals, and minimize the risk we can foresee. Just remember what Mike Tyson shared one time, “Everyone has a plan until they get punched in the face.” A gentle reminder that planning is just a piece of it all, how we react is key.

While the concept of strategy may seem daunting, we can break it down into a structured, 4 part, logical process.

1.Current State: Thoroughly assessing your business' present reality, including feedback from customers, employees, and market trends.

2.Desired Future: Revisiting your compelling vision - both the long-term "Always Vision" and the nearer-term "Horizon Vision" - to ensure it remains clear, relevant, and motivating.

3.The Path Forward: Outlining the specific objectives, initiatives, and resources needed to bridge the gap between your current state and your vision.

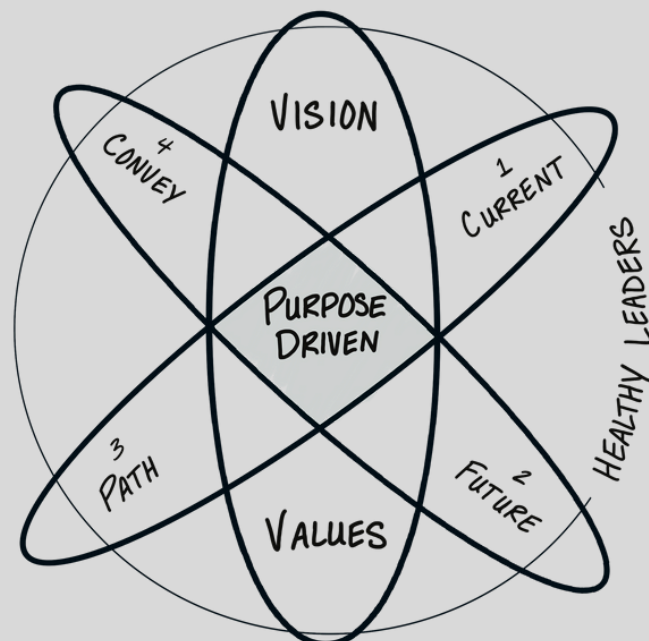
4.Effective Conveyance: Communicating the strategy in a way that engages and aligns your entire team around the plan.

Just note, these are essential to the Winning Strategy, but there's something that is often overlooked... The Foundational Four: Healthy Leadership, Vision, Purpose Driven, and Values are all key to integrate into your strategy.

Check out our sweet sketch below that shows how they are all connected, it's like a fine balance of flower power and strategy!

Strategy is an ongoing process. There's no one answer for your business; its formed with a process of choices. The process itself reveals your strategy, which evolves over time and is fueled by the most critical resource in your company: your people.

It's not the magical plan that moves the needle but the individuals behind it.





# CURRENT STATE

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**This is where you assess the current state of your business to find key takeaways.**

This part is all about diagnosing, gathering insights, and forming a clear picture of your business's current state. Each one of these items (along with others, such as marketing and sales performance, operational efficiency, employee development, turnover rates, and current strategic plans) are action steps you should take to understand your business. You will be amazed on how collecting this information will change your perspective.

## Survey “Boots on the Ground”

Surveys are often dreaded, but when used intentionally, they can be incredibly valuable. Gather insights from two key sources: external (customers, vendors, suppliers, etc.) and internal teams (employees, partners, etc.). “Boots on the ground,” might not always have access to participation, so make it simple—set up a tablet or laptop on location for them. Here are some questions to ask your employees:

1. What's the biggest headache you deal with in your role, and how can we help fix it?
2. Do you feel like your voice is heard? Be honest—how well do we act on feedback?
3. If you had a magic wand and could change one thing about working here, what would it be?
4. Looking back over the past year, what's one thing we've totally nailed—and one thing that still needs work?

## Trends Review

Research industry trends on a regional, national, and global level. Network with peers and use research tools like Google Scholar. By making this a regular habit rather than a one-off task, you'll not only gather valuable insights but also develop your leader's analytical skills.

## Interviews with Leaders

These aren't formal like hiring interviews but informal, productive conversations. They provide valuable facetime with your key leaders. They often reveal information you wouldn't get any other way. If time is tight, focus on areas of your business that are critical or facing immediate challenges. Here are some questions:

1. What's keeping you up at night about the business, and what's one thing we could do to make it better?
2. If we gave you a magic “fix-it” button for one challenge in your department, what would you use it on first?
3. If you had an unlimited budget for one initiative this year, what would you invest in—and how would it change our business?

## Products & Service Review

Whether you offer a service or a tangible product, it's critical to consistently evaluate quality, competitiveness, and efficiency. Compare your offerings to competitors, track rework metrics (time and resources spent correcting mistakes), and identify ways to improve. Competition isn't your enemy—it's your ally in sharpening and refining what you do best.

# DESIRED FUTURE

This is where you revisit your vision. Vision is your guide to the rest of your strategy.

Your vision serves as the guiding light for your strategy (hence why it's on top of the flower power sketch, it's like the north star of your strategy). Revisit this vision with leaders to ensure it remains clear, actionable, and compelling. Your leaders will be the ones cascading the vision throughout the company. Every year you will want to ensure that your Always and Horizon Vision is still true and relevant. Here are 3 important reflective questions to review with your leaders:

1. Is our current vision still clear, relevant, and inspiring?
2. Are we fully aligned with the vision, and are we effectively communicating and reinforcing it?
3. What key adjustments or strategic shifts are needed to ensure we stay on track toward achieving our vision?

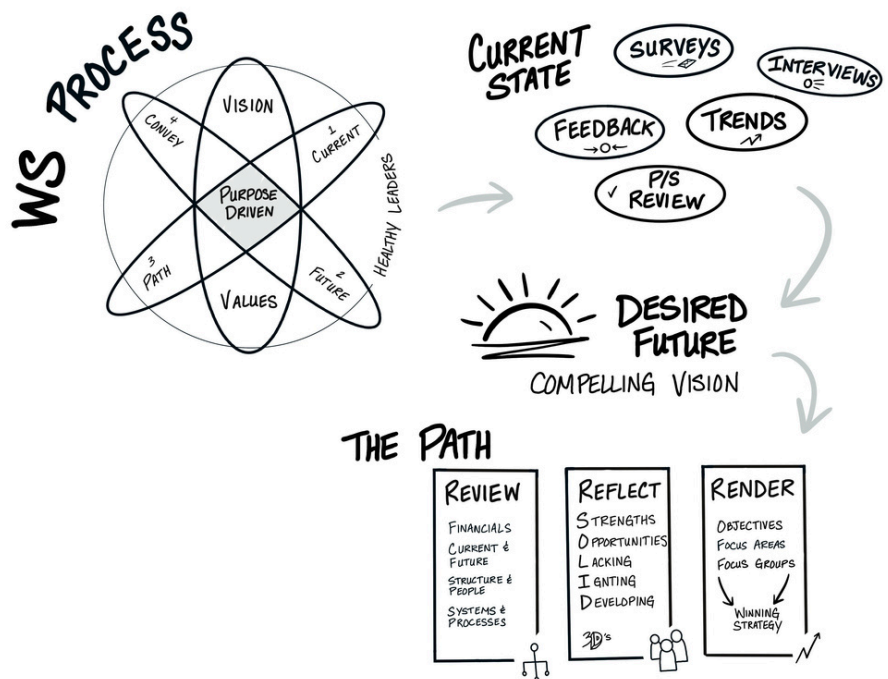
It's time to begin putting all the Current and Desired Future pieces together, then forming it into an executable plan.

To create a clear path, you should break it down into 3 sessions:

**Review**

**Reflect**

**Render**



CONTINUE

## Session 1 is Review. This is where you review applicable information of your business and what's been collected to this point. Review these key areas...

# REVIEW

### FINANCIALS

This is an obvious one, but in a nutshell; how profitable are you? Review these as potential options for increase:

- Increase Pricing: Evaluate opportunities to increase the cost of your products and services.
- Sell More: Identify ways to increase sales of your current offerings.
- Operations: Increase efficiencies of products & services.
- Faster AR: Get paid faster for products and services through Accounts Receivables.
- Slower AP: Pay out slower through Accounts Payable.
- Decrease Direct Costs: Decrease money paid for supplies and labor of products and services.
- Shrink Inventory: Decrease inventory on hand.

### CASH FLOW

Cash flow management, ensures your business has enough liquidity to cover expenses and invest in opportunities. By regularly reviewing a cash flow statement, which tracks cash inflows and outflows over time, businesses can identify patterns, predict potential shortfalls, and make informed decisions to sustain operations. Turning this into a goal means setting specific benchmarks for cash reserves and creating strategies to maintain consistent cash flow, such as timely invoicing and better payment terms.

### BUDGETING

A well-designed budget acts as a roadmap, guiding financial decisions and helping you prioritize spending. Rather than micromanaging every dollar, a budget should focus on identifying opportunities for cost-saving and optimizing your resources. To turn budgeting into a goal, you can aim to create a quarterly or annual budget, monitor actual performance against it, and adjust as needed to stay aligned with long-term objectives. Budgeting also allows you to create a cash reserve goal for the year. This is for unexpected costs or investments you want to save for later.

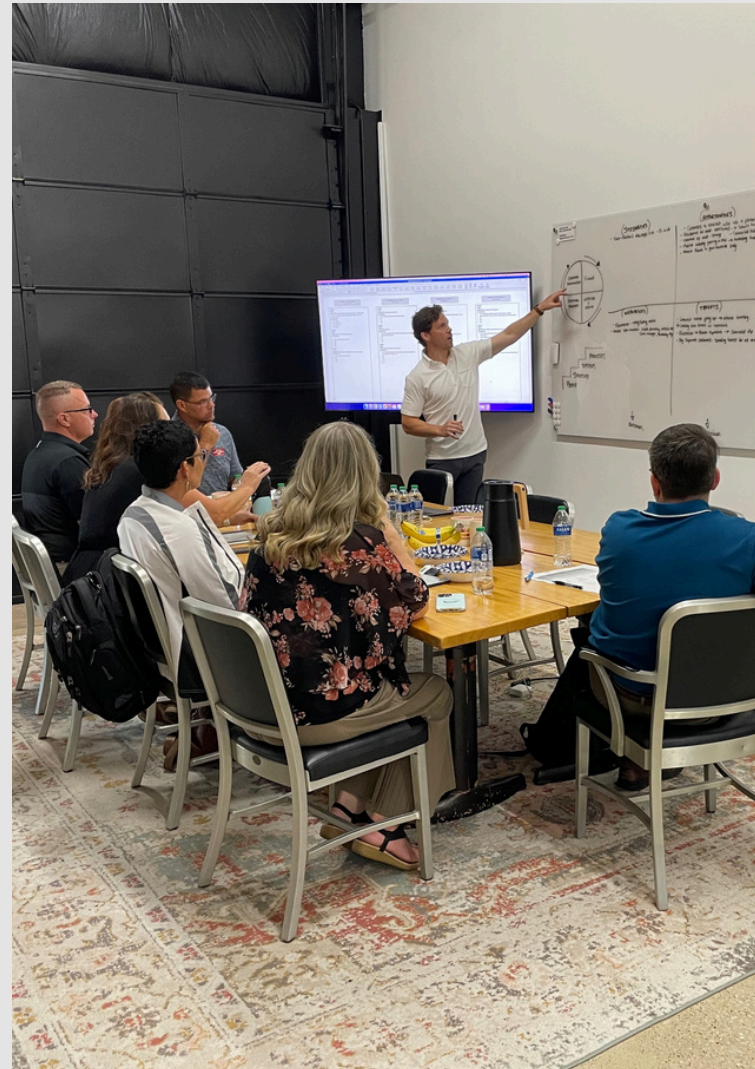
### EXPENSES

Evaluate current expenses, cutting unnecessary costs, and improving operational efficiency. Setting a goal here might involve identifying three key areas for cost reduction or establishing a percentage decrease in overall expenses. The main areas to ensure you write down, when ready, are:

- Revenue Goal
- Cash Flow Goal (per month)
- Net Profit Goal
- Cash Reserves Goal.

### CURRENT & FUTURE FEEDBACK

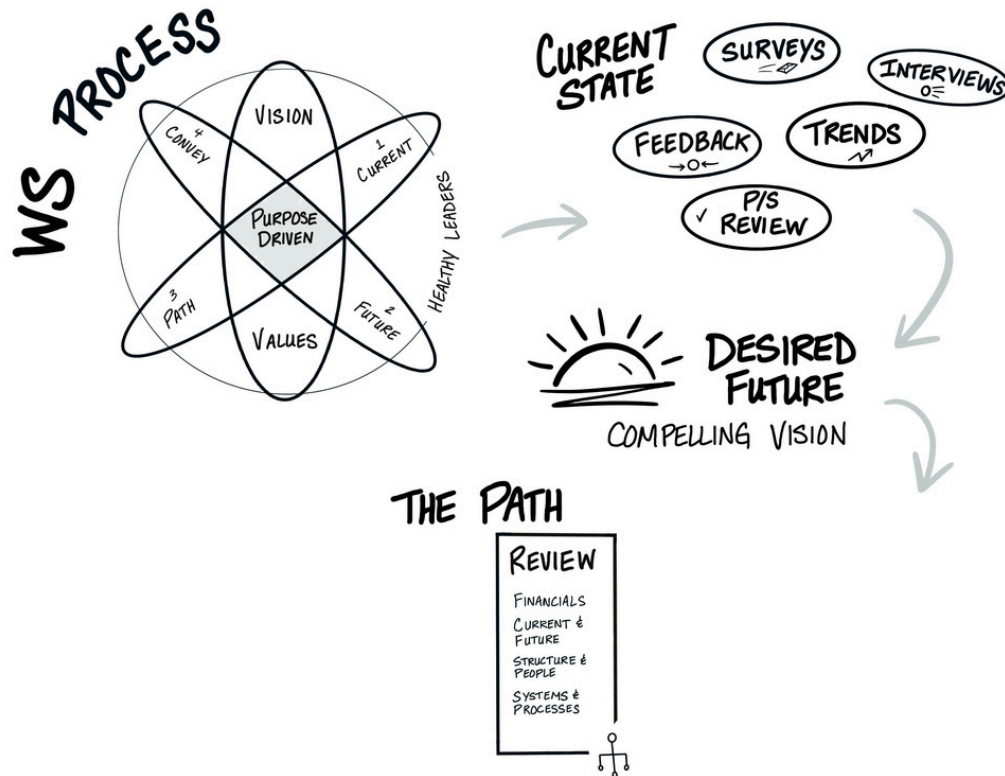
This is where you begin piecing it together. Including surveys, interviews, your vision, product and service review, and trends. You are looking for the obvious and not so obvious correlations. For example, maybe in your product review you noticed that there were some inconsistent quality problems. There could be many things to discuss like culture, Quality Control, and employee motivation per their job, to name a few. As a team, you will want to just review, not necessarily solve any problems just yet.



# REVIEW

CONTINUED

Continue reviewing key areas, in this session, you'll finish with **Structure and People**—**Systems and Processes**.



## STRUCTURE & PEOPLE

With growth comes complexity, complexity kills growth. The Structure and People Review is about reviewing your org chart together, ensuring that it still makes sense and is operating well. It's also about evaluating your people to see if they are in the right seats per their skills, talents, and motivations. A lot... I mean a lot of problems we face boil down to structure and people. Here are key questions to ask:

- Do we have an org chart that clearly communicates who reports to who? Update and clarify as you grow.
- Is everyone on the right seat of the bus? Author Jim Collins famously made this phrase meaningful. As you grow, review if people are using their God-given skills and talents effectively and in the right seat.
- Do our leaders share and encompass our values? Believe it or not, people change. Of course they do, we all do, but when it comes to your business, we need to consistently realign our people to our values.
- Do our leaders share and encompass our vision? This question isn't asking if they know it, it's asking if they actually share it and embody it. Do they want it?

## SYSTEMS & PROCESSES

At the end of the day, your systems and processes are only as good as the people running them. Whatever the input is will determine the quality of the output. Systems are defined as the workflows for your business. Processes live within systems. Technology has become one of the biggest pieces of systems, you might be missing out if you are still trying to update that spreadsheet and share it every week. Processes are defined as the activities created and followed to achieve business goals. It's the more granular workflow that helps with training and consistency. Here are some key questions to ask:


- Where are the "roadblocks" in our company? Review areas with obstacles and constraints slowing down your work.
- Where do we see inconsistency or redundancy? Review parts of the company that don't have the outcome you expected.
- What can we make more efficient? We should be looking for ways to streamline operations.



**Session 2 is Reflect. Reflect on key strengths, opportunities, and objectives already in motion.**

# REFLECT

<b>STRENGTHS</b> <small>Build On</small>	<b>OPPORTUNITIES</b> <small>Inside &amp; Outside Company</small>	
<b>LACKING</b> <small>Need Very Soon</small>	<b>IGNITING</b> <small>Fires Getting Started</small>	<b>DEVELOP ON</b> <small>Continue the Fires</small>



This is the collaboration work; you want to take all the captured information and feedback from all areas of your business and collaborate on key SOLID questions. We created this exercise to help leaders reflect on key elements, but also not forget about objectives that were already in the works. Remember the overtaking piece? This exercise is a powerful tool and if done right, you will have taken all the inspirations, thoughts, and chaos and put it to paper.

## Strengths

What are the strengths of our business? List out as many as you can think. You should not only know your strengths, but you should know how to continue to build on them.

## Opportunities

What are opportunities inside and outside of the business? From marketing to employee development to trends you see in your industry. Write it down!

## Lacking

What are we lacking that we need very soon? New fleet vehicles, a new software for accounting? The key here is that you're listing out things that needs done in the near term.

## Igniting

What "fires" are just getting started? List the objectives that you're already working on that take significant resources like people, time, and money. Knowing this will help you not be overtaxed.

## Develop On

What things should we continue to work on? From your "Igniting" list, transfer objectives that still need to be pursued to the "Develop On" list. This is where you find out how many "fires" need to stay a blaze.

# THE 3D'S

**Session 2, Reflect continued. The 3 D's is where you pair down and focus on.**


## DECISION, DISTRACTION, or DEDICATION


Now that you have everything out in plain view and have had time to think through and review the collected information with a willingness to question what's unclear, say the hard truths, and reflect on progress, it's time to make some choices.


As a team, go back to your SOLID exercise. As you discuss, circle in blue which items you can make a decision on soon. These normally don't take time, mostly just a decision from the appropriate person. This could be as simple as the decision to hire a new employee, invest in additional software, etc. All blue circled items don't need a decision now but should be able to be made in the near future. Write next to each blue circled item the name of who should make each decision. Essentially, these items don't need a strategy or objectives, they just need a decision. Then you can move to distractions.

Put a red "X" on the items that are distractions, things you could work on, but will most likely just be a distraction at this point. The brilliant Michael Porter, Harvard business professor and author says, "The essence of strategy is choosing what not to do." Your team will need to cross off what not to do. These items will often take time to "X," since your leaders may disagree on which items are important and which are not. In general, if you don't believe it will help you move toward your vision, then "X" it off the list.

Once you've gone through that, separately, indicate with a green circle which items you want to dedicate time and energy to the most. These will most likely be objectives you put on your final Winning Strategy. At the end of this session, you should know which objectives you really want to pursue as a company because your team believes it will "move the needle," they will propel you closer to your vision.

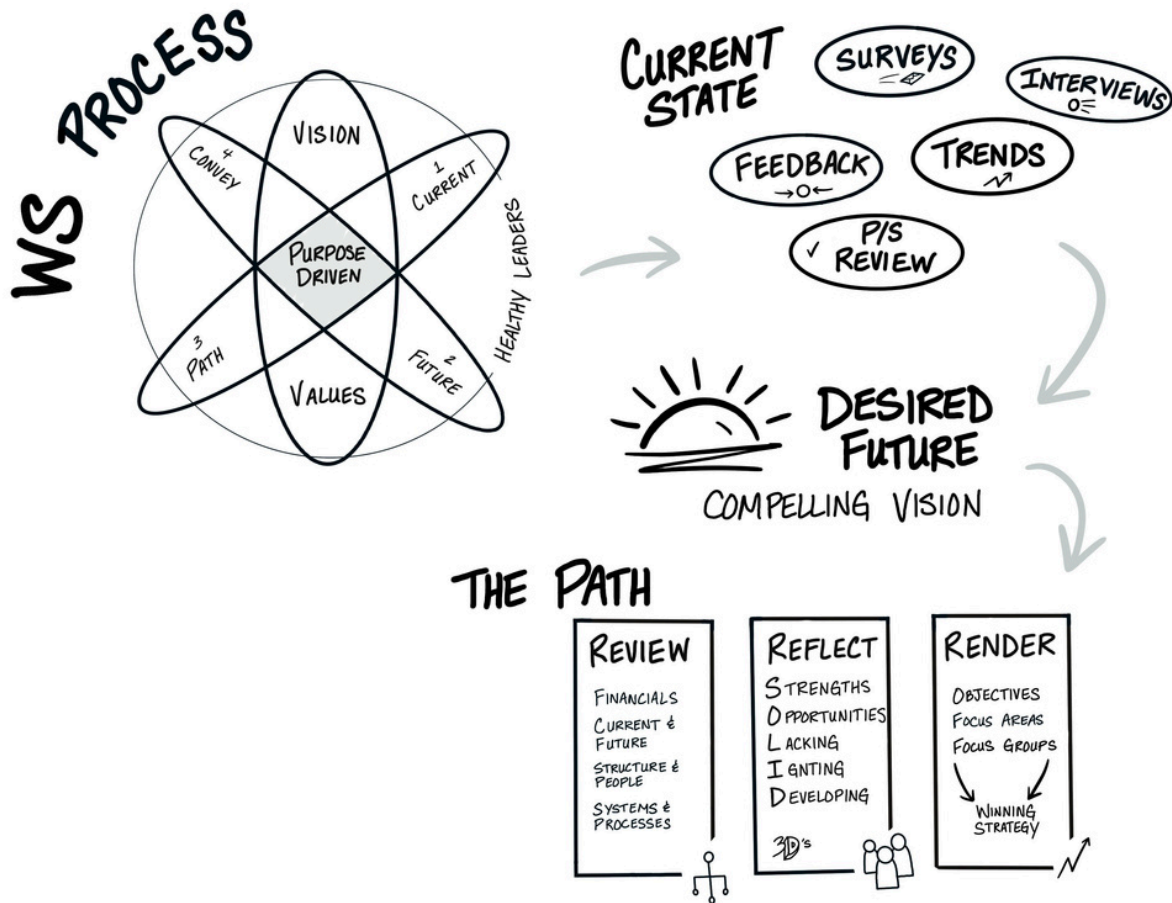
 = DECISION  
SOON

Red  = DISTRACTION

 = DEDICATE

# RENDER

**Session 3 is Render. This is where you put a draft together of your Winning Strategy. You should have clear objectives.**



Once you know some of the objectives, you will want to find some commonalities – Focus Areas. The goal is to find the broad areas that help the company communicate what you’re planning to work on. This part really helps with clarity if done right. There are many “mountains” that we can climb, but you should pick only the few that you believe will propel you toward your vision. Maintaining this focus, will help form a culture of results-driven teams that enjoy using their skills while being held accountable.


We worked with a company that had many important objectives like employee training, improving onboarding, and developing high potential employees with 1:1 mentoring. It was apparent that one of their Focus Areas that year was “People Development.” Moving those objectives under that Focus Area allowed for better communication for the leaders helping drive those objectives. Focus Areas should always lead to your vision and be attached to them. For this company, “People Development” was directly tied to their vision of expanding into new territories. Once you identify your Focus Areas, it also forces your team to pick and choose on the objectives. You can’t do everything, don’t overtax yourself.


Then, you can write the key outcomes per quarter for each objective. This is how you know that you’re winning. We suggest that you only have a few objectives under each Focus Area, beyond that, you will be overloaded and lead to overtaxing your team – though, that will depend on the time and resources available. Most likely, these objectives can be done within a year, but some might be longer, regardless, they can be flexible in how you achieve them. Your leaders should be updating their objectives monthly and reviewing them on a quarterly basis.


# WINNING STRATEGY


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
LOGO

  
 Half truth is cowardly

  
 It is wiser to find out than suppose

  
 Humor is mankind's greatest blessing

  
 Continuous improvement over delayed perfection

  
 Don't depend on your eyes when your imagination is out of focus

**VALUES CENTRIC**

**VALUES SHAPE OUR BELIEFS, THOUGHTS & ACTIONS**

**CLARITY**

WHAT WE DO

WHO WE HELP

HOW WE DO IT

**PURPOSE DRIVEN**

**ALWAYS VISION, 10+ YEARS.**

CHARACTERISTICS/DESIRES/BIG GOALS

- 
- 
- 
- 
- 

REVENUE GOAL |

**HORIZON VISION**

**ALWAYS  
MEASUREABLE  
& CONSISTENT**

**CORE PROMISES**

ONE

TWO

FOCUS AREA 1 (TITLE)	FOCUS AREA 2 (TITLE)	FOCUS AREA 3 (TITLE)
<p><b>THE WHY:</b></p> <p>1-1 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p> <p>1-2 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p>	<p><b>THE WHY:</b></p> <p>2-1 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p> <p>2-2 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p>	<p><b>THE WHY:</b></p> <p>3-1 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p> <p>3-2 DRIVER: TEAM: OBJECTIVE: KEY OUTCOMES: Q1 Q2 Q3 Q4</p>
<p><b>YEARLY FINANCIAL GOALS TIED TO VISION &amp; FOCUS AREAS</b></p> <p>REVENUE GOAL  </p> <p>CASH FLOW GOAL  </p> <p>NET PROFIT GOAL  </p> <p>CASH RESERVES GOAL  </p>	<p><b>LEADERS TO INVEST IN THE NEXT YEAR:</b></p> <ol style="list-style-type: none"> <li>(NAME) – DEVELOPMENT OPPORTUNITIES:</li> <li>(NAME) – DEVELOPMENT OPPORTUNITIES:</li> <li>(NAME) – DEVELOPMENT OPPORTUNITIES:</li> <li>(NAME) – DEVELOPMENT OPPORTUNITIES:</li> <li>(NAME) – DEVELOPMENT OPPORTUNITIES:</li> </ol>	

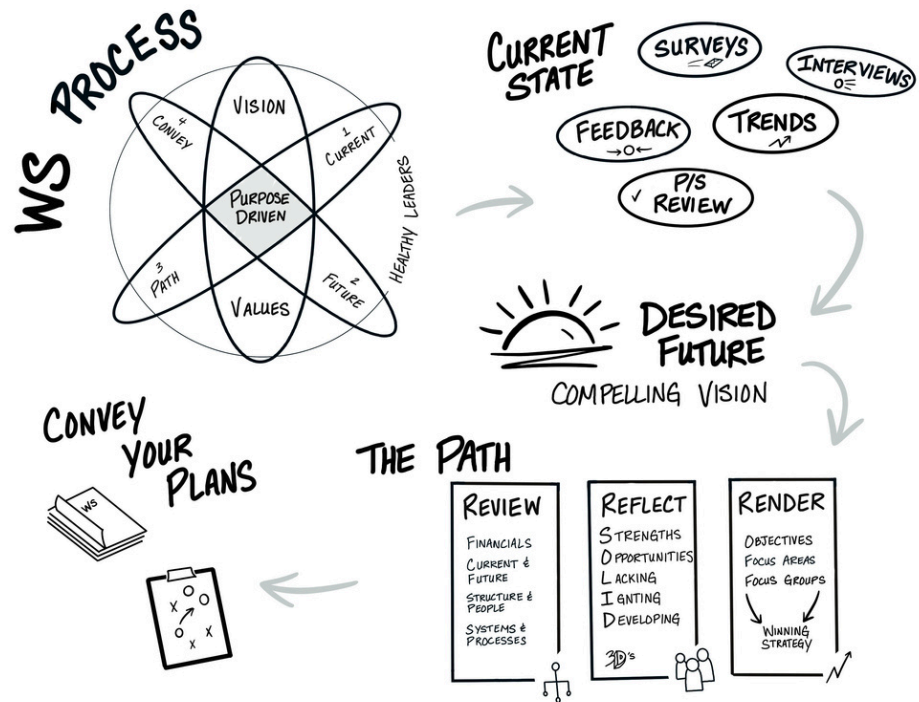
Filter the 'Objectives' into personal goals



**Convey your vision and plans to your employees, ensure they know their part.**

# CONVEY

Once you know some of the objectives, you will want to find some commonalities – Focus Areas. The goal is to find the broad areas that help the company communicate what you're planning to work on. This part really helps with clarity if done right. There are many “mountains” that we can climb, but you should pick only the few that you believe will propel you toward your vision. Maintaining this focus, will help form a culture of results-driven teams that enjoy using their skills while being held accountable.



Create a plan to communicate to employees the information that helps them know what you want to achieve and how you plan on doing it. This is where we see leaders slip. They've put together these grand plans and then let it collect endless dust that is somewhat removed after every monthly cleaning. I mean, if you're still printing it out that is... we suggest it all be housed on a shared online doc. Now I'll pause here and say, if you are using software for this, awesome, but you don't have to. We've worked with national firms who use shared drives, so they don't live-in too many platforms. We suggest doing what works for you. After it's all put together, you'll want to go through some key questions, as a group of leaders, to prepare for and ensure readiness to create a communication plan:

- Does this plan move us closer to our vision?
- Who's the “driver” of the Winning Strategy? The person in charge of keeping track of the entire plan.
- Have we taken on too much, is it reality to achieve this in our frame?
- What resources will we need to achieve this?
- What obstacles will keep us from achieving this?
- What will be the distractions we need to pay attention to?
- How will we know if we are really on track?

A photograph of three men in a meeting. The man in the foreground is wearing a black baseball cap and a red and black plaid shirt, looking towards the right. Two other men are visible in the background, also looking in the same direction. The background is slightly blurred, showing a window with blue light.

# OWNERSHIP

## ENCOMPASS A CEO MINDSET

### Create strategic thinkers

Help your leaders lift their heads, think about future possibilities, and foresee obstacles, that's building strategic thinkers. Build leaders who can think for themselves, analyze, and find a path forward. A skill that most leaders need to learn with intentionality, time, and experience. Creating strategic thinkers is creating people who consistently find problems to solve and strategize; not just taking care of what "lands on their desk."

### Engage your team

The CEO mindset is not a game of individualistic approaches. It takes a team that starts with trust but paves the way to true collaboration. Yes, we want strategic thinkers, but helping your leaders achieve a Winning Strategy takes commitment and engagement. If you want to engage the team, you need your team to share their true thoughts. Your team should adopt the belief that until the team members speak into the idea, it is not yet a commitment. Caution here, this does not mean that you should give false promises. Don't lead them to believe that because their idea is heard that it will be the end-all. Also, we are not looking for consensus, if that was the goal, then many teams would be stuck in stalemate. We want to engage the team by inviting them into the strategy, because it will, no doubt, take more than just you to achieve.

### Own your commitments

Be clear about who is doing what, how it should be done, and by what time. We see strategic projects and meetings starting without a clear goal established, and inevitably, a team with a lot of disappointment and frustration. Owning your commitments is a holistic process that creates room for team members to participate and have accountability. Owning your commitments as a team takes clarity, ensuring that all of the team members are aligned, and commitments are leading to your vision. Your team will need to be reminded of the commitment, and the importance of the Winning Strategy, repeatedly.

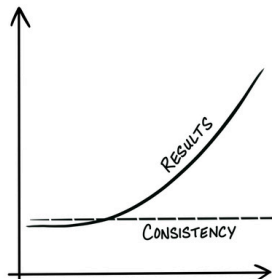




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