

# Energizing Your Practice with *Strategic Traction*

# ***SUSTAINABLE SUCCESS***

**CPG's Commitment:**

**Help companies and nonprofits achieve sustainable success.**

# *SUSTAINABLE SUCCESS*

## CPG Background:

Members of the CPG Team have extensive experience as business leaders and owners. We started and ran successful businesses in different industries.

We also ran some unsuccessful companies – but we learned from our mistakes.

As business advisors and coaches, we have helped improve the performance of hundreds of companies and nonprofits.

## ***SUSTAINABLE SUCCESS***

A lot of factors contribute to achieving sustained success – but we believe consistently meeting or exceeding key stakeholders expectations is one of the most important factors.

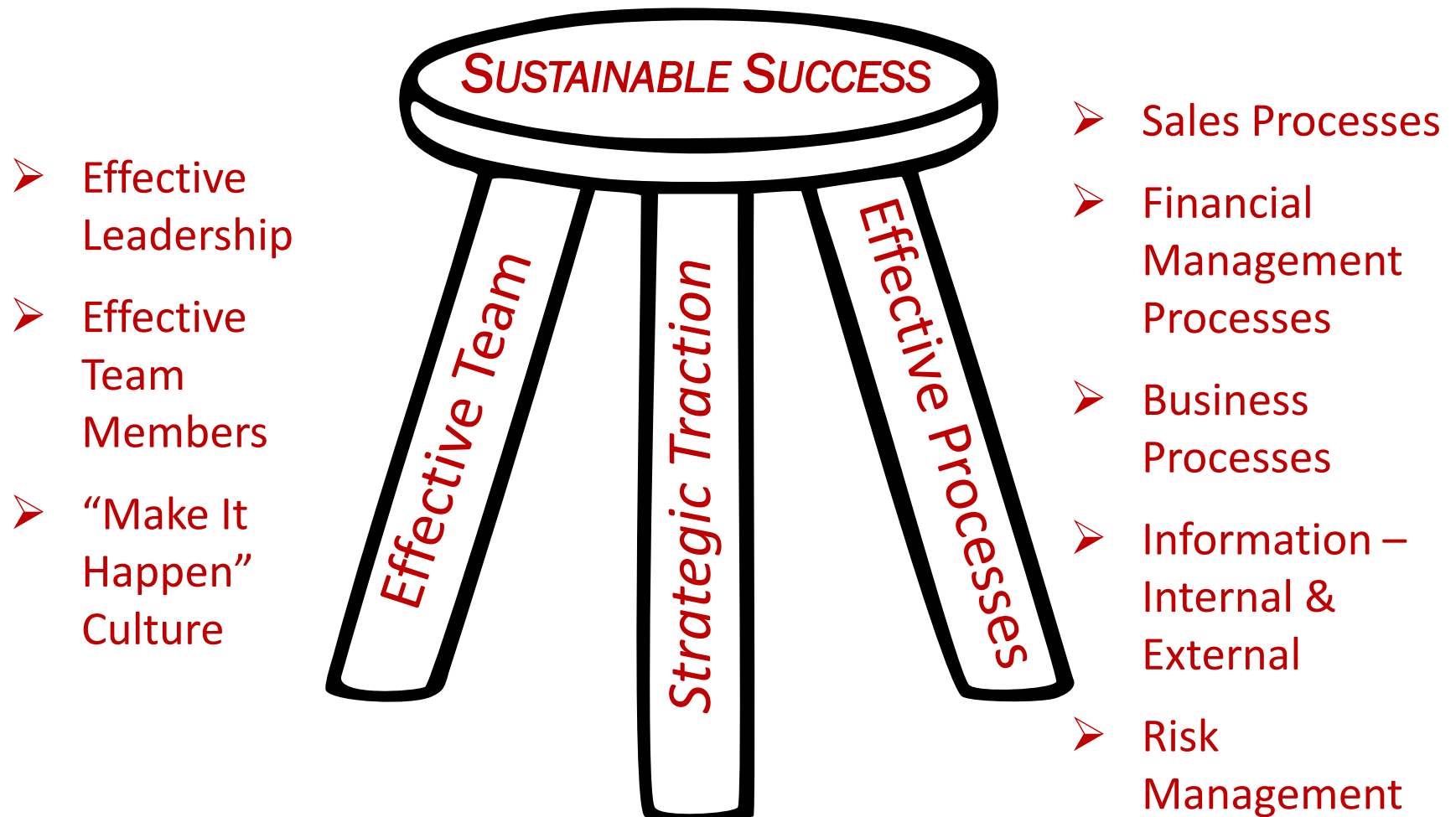
# ***SUSTAINED EXECUTION MODEL***

Developed *SUSTAINED EXECUTION MODEL* building on:

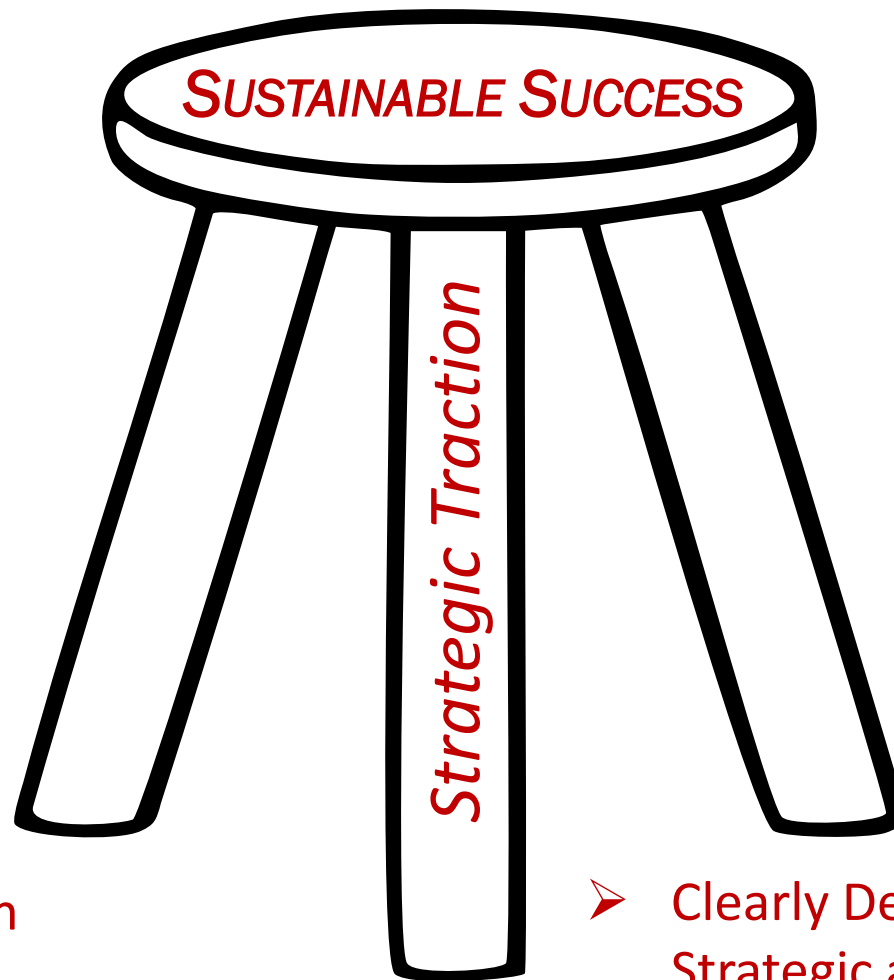
- Our experience in starting and running successful – and unsuccessful – companies.
- Our experience in helping improve the performance of hundreds of companies and nonprofits.
- Proven management concepts and techniques advocated by Jim Collins, Patrick Lencioni, Stephen Covey, Ken Blanchard, Verne Harnish, Gino Wickman and other leading management experts.
- Our experience as Strategic Framework and EOS facilitators.
- Techniques used by coaches of successful sports teams.

# *SUSTAINED EXECUTION MODEL*

The *Sustained Execution Model* has three components:



# *SUSTAINED EXECUTION MODEL*



- Clear Vision
- Stakeholder Expectations
- Effective Business Model

- Clearly Defined Plans – Strategic and Tactical
- Effective Management System to Drive Execution

# ***STRATEGIC TRACTION***

Studies find that 70% to 90% of business strategies fail in execution – meaning even the best conceived strategies won't produce targeted results if the strategies aren't executed effectively.

From our experience, we've found that creating an accountability culture and driving effective execution are the keys to achieving and sustaining business success. We use ***Strategic Traction*** to help business owners and leaders create accountability and drive execution.



# ***STRATEGIC TRACTION***

***Strategic Traction*** is strategic and tactical planning – combined with a Management System to drive execution.

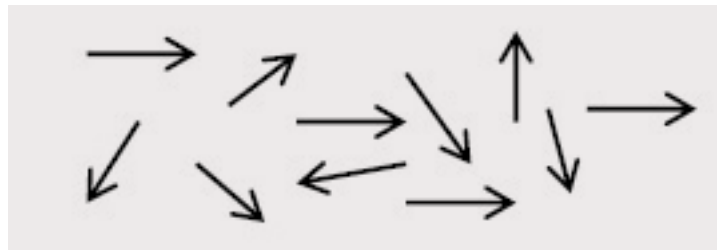
A Management System is a defined set of **processes** and **language** for effectively driving, managing and controlling a company.

Most large companies have Management Systems in place, but many mid-sized and small companies “fly by the seat of the pants.”

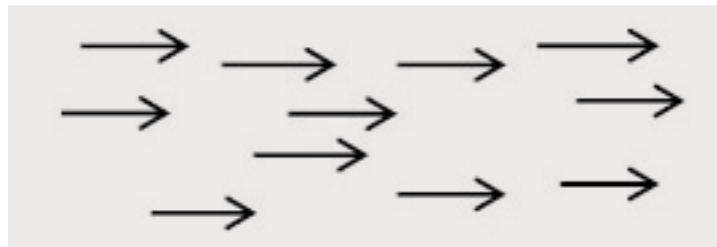
# ***STRATEGIC TRACTION***

In simple terms, ***Strategic Traction*** gets everyone in an organization working together in the same direction.

Typical company or nonprofit:



Company or nonprofit with ***Strategic Traction***:



## ***SUSTAINED EXECUTION MODEL***

*“**Strategic Traction** has really improved communication between our managers and our employees. For the first time, we are successfully focusing on an agreed upon set of tasks and issues and we are getting results quickly”*

Mark Abels, Owner  
Selco, Tulsa

*“As we added new employees and new management team members, we decided to adopt and implement a management operating system. **Strategic Traction** has showed us how to implement a great management program that keeps our entire company focused on our goals.”*

Dustin McDaniel, Owner  
McDaniel Technical Services, Tulsa

# Strategic Traction

## Preparation

- Interviews
- Organizational Assessment
- Personnel Assessments

### Discovery

### Foundation

### Vision

### Strategy

### Execution

### Quarterly Recharge

### Annual Reset

## Actions

- |  |  |   |   |   |   |   |
|--|--|---|---|---|---|---|
| <ul style="list-style-type: none"> <li>• Determine Objectives &amp; Issues</li> <li>• Strategic Traction Assessment</li> <li>• SWOT Analysis</li> <li>• Introduce Sustained Execution Model</li> <li>• Introduce Strategic Traction Process</li> </ul> | <ul style="list-style-type: none"> <li>• Three Things Gut Check</li> <li>• Define Stakeholder Expectations</li> <li>• Identify Critical Challenges &amp; Success Factors</li> <li>• Establish Quarterly Objectives &amp; Rocks</li> <li>• IDS Issues</li> <li>• Meeting Pulse – Weekly MRIs, Quarterly Recharge &amp; Annual Reset</li> <li>• Initial Company Metrics</li> </ul> | <ul style="list-style-type: none"> <li>• Working/Not Working</li> <li>• Strategic Traction Organizer (“STO”)</li> <li>• Core Focus – Purpose &amp; Niche</li> <li>• Core Values</li> <li>• Culture</li> <li>• BHAG or What is Success?</li> <li>• Define Business Model(s)</li> </ul> | <ul style="list-style-type: none"> <li>• Working/Not Working</li> <li>• Validate Metrics</li> <li>• Validate Core Focus</li> <li>• Validate Core Values</li> <li>• Validate Culture</li> <li>• Validate BHAG or What is Success?</li> <li>• Complete Business Model(s)</li> <li>• Develop 3-Year Picture</li> </ul> | <ul style="list-style-type: none"> <li>• Validate Business Model(s) and 3-Year Picture</li> <li>• Define Strategic Initiatives</li> <li>• 1-Year Plan – Performance Targets &amp; Objectives</li> <li>• Leadership Team 1-Year Goals</li> <li>• Accountability Chart</li> <li>• Right People, Right Seat</li> <li>• Everyone Has a Number – Individual Metrics</li> <li>• Update Objectives &amp; Rocks</li> <li>• Update Metrics</li> <li>• Roll Out Strategic Traction</li> </ul> | <ul style="list-style-type: none"> <li>• Working/Not Working</li> <li>• Review 1-Year Plan &amp; Previous Quarter Rocks</li> <li>• Leadership Team Development</li> <li>• Right People, Right Seat</li> <li>• Performance Evaluations</li> <li>• Build Culture</li> <li>• Critical Processes</li> <li>• IDS Issues</li> <li>• Define Next Quarter Theme &amp; Celebration/Incentive</li> <li>• Establish Next Quarter Objectives &amp; Rocks</li> </ul> | <ul style="list-style-type: none"> <li>• Review Previous Year Working/Not Working</li> <li>• Leadership Team Development</li> <li>• Update Strategic Traction Assessment</li> <li>• Validate Vision</li> <li>• Evolve Business Model &amp; Strategies</li> <li>• Update 3-Year Picture &amp; Strategic Initiatives</li> <li>• Right People, Right Seat</li> <li>• 1-Year Plan – Performance Targets &amp; Objectives</li> <li>• IDS Issues</li> <li>• Define Next Quarter Theme &amp; Celebration/Incentive</li> <li>• Establish Next Quarter Objectives &amp; Rocks</li> </ul> |
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# STRATEGIC TRACTION

ORGANIZATION NAME:

DATE:

## VISION & STRATEGY

<p>PURPOSE</p> <p>OUR NICHE</p> <p>CORE VALUES</p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol> <p>ENVISIONED FUTURE BHAG OR WHAT IS SUCCESS? (DATE)</p> <p>VIVID DESCRIPTION</p>	<p>CUSTOMER EXPECTATIONS</p>	<p>CRITICAL SUCCESS FACTORS</p> <p>Meet or exceed Stakeholder expectations.</p> <p>Effective communication – internal &amp; external.</p>	<p>THREE YEAR PICTURE (Date)</p> <p>Paint a picture of what you want the company to look like in three years:</p> <p>Products/Services</p> <p>Markets</p> <p>Locations</p> <p>Total Customers</p> <p>Targeted New Customers</p> <p>Growth Rate</p> <p>Employees</p> <p>Revenues</p> <p>Gross Profit %</p> <p>Net Profit %</p> <p>Other</p> <p>CRITICAL CAPABILITIES</p> <p>STRATEGIC INITIATIVES</p> <p>Markets</p> <p>Competitive Uniques</p> <p>Capabilities</p> <p>Organization</p>
	<p>EMPLOYEE EXPECTATIONS</p>	<p>BUSINESS MODEL &amp; STRATEGY</p> <p>TARGET MARKET</p>	
	<p>OWNER/PARTNER EXPECTATIONS</p>	<p>TARGET CUSTOMERS</p> <p>MARKET STRATEGY</p>	
	<p>CRITICAL CHALLENGES</p>	<p>THREE UNIQUES</p> <p>SELLING STRATEGY</p>	

# STRATEGIC TRACTION

## EXECUTION

1-YEAR PLAN	NEXT QUARTER ROCKS	ISSUES & FUTURE ROCKS																																																																																			
<p>Future Date: Revenue: \$ Profit: \$ Measurables:</p> <p><b>Objectives for the Year:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 5%;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.		<p>Future Date: Revenue: \$ Profit: \$ Measurables:</p> <p><b>Rocks for the Quarter:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 85%;">Rocks for the Quarter:</th> <th style="width: 10%;">Who</th> </tr> </thead> <tbody> <tr><td>1.</td><td></td><td></td></tr> <tr><td>2.</td><td></td><td></td></tr> <tr><td>3.</td><td></td><td></td></tr> <tr><td>4.</td><td></td><td></td></tr> <tr><td>5.</td><td></td><td></td></tr> <tr><td>6.</td><td></td><td></td></tr> <tr><td>7.</td><td></td><td></td></tr> <tr><td>8.</td><td></td><td></td></tr> <tr><td>9.</td><td></td><td></td></tr> <tr><td>10.</td><td></td><td></td></tr> </tbody> </table>		Rocks for the Quarter:	Who	1.			2.			3.			4.			5.			6.			7.			8.			9.			10.			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 5%;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> <tr><td>11.</td><td></td></tr> <tr><td>12.</td><td></td></tr> <tr><td>13.</td><td></td></tr> <tr><td>14.</td><td></td></tr> <tr><td>15.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.		11.		12.		13.		14.		15.	
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# Company Name Quarterly Rock Sheet

Future Date: 12-31-2017

Revenue/Profit:

Measurables:

COMPANY ROCKS	WHO	WHEN
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# MRI Meeting

## The Weekly Agenda

Day: \_\_\_\_\_

Time: \_\_\_\_\_

**Segue (Personal & Business Bests) 5 Minutes**

**Metrics Review 5 Minutes**

**Rock Review (On Track / Off Track) 5 Minutes**

**Customer / Vendor / Employee Headlines (Good / Bad Reports) 5 Minutes**

**To-Do List (Done / Not Done) 5 Minutes**

Date Added	Who	To-Do	Complete By

**Issues List (Prioritize; IDS) 60 Minutes**

Priority	Issue

# *STRATEGIC TRACTION*

Getting Started:

Client Expectations

Critical Success Factors

Business Model – Three Uniques

Metrics

Rocks