



# Planning Intensive

## WORKBOOK

**Name:**

**Company Name:**

**Date:**

**Flight Plan #:**

*You can fill out this workbook online.*

*You will need these notes to complete your Flight Plan.*

# Thinking Time

## Looking Back:

### Reviewing your business' past performance

1. What worked over the past 6 months and why?
2. What is the one problem that still needs to be solved?
3. What happened in the past 6 months that shouldn't have happened?
4. What didn't happen that should have happened?
5. What changed in the last 6-12 months? And is that ok?
6. What opportunities / challenges are looming?

# **Thinking Time**

## **Looking Forward:**

**What are you optimising for in this next period?**

- 1. What are the few specific measurable outcomes I am optimising?**
- 2. What are the specific expectations I have about what these outcomes look like when they are achieved?**
- 3. How do I successfully communicate these outcomes and create 100% clarity with my team about my expectations?**

# Thinking Time

## Clarity on the Gap

### Point A to Point B

1. What is the primary obstacle that is 'choking' our progress between where we are today and where we want to be?
2. If this obstacle is so obvious, why haven't we seen or addressed this obstacle previously?
3. What sacrifices will we need to make, or risks we will need to take, to overcome this obstacle and close the gap?

# Clarity Going Forward

## 90 Day Major

90 Days Minor 1

90 Days Minor 2

90 Days Minor 3

## 60 Day Major

60 Days Minor 1

60 Days Minor 2

60 Days Minor 3

## 30 Day Major

30 Days Minor 1

30 Days Minor 2

30 Days Minor 3

What will this mean to me, my business, and my life if achieve this?

## What needs to be achieved in **TIME** that will help you to achieve the High-Performance Challenge?

	Task Description	YES or NO	Items I will work on in the next 6 months
1.	The business has a default diary that the team refer to daily / weekly / monthly		
2.	I regularly review my low value tasks and consistently delegate/outsource them		
3.	My annual goals are broken down into quarterly / monthly/ weekly/ daily actions		
4.	I have audited my time for a week and understand where my time is effective and / or wasted		
5.	I have a regular time in which I plan the following week and prioritise my key activities		
6.	I have time slots in my diary for my own health and enjoyment – understanding that life balance is important to the productivity of my business		
7.	I have a default diary and refer to it daily / weekly / monthly		
8.	I have an allocated 'hour of power' (business owner's time) each week to conduct my thinking time for the business		
9.	I have a 'things to achieve' vs a 'things to do' plan		
<b>**Flight Plan 6+ options</b>			
10.	Allocated Exitability thinking time of 2 hours per week		
11.	Board Writing time per week allocated		
12.	'A' grade stakeholders feedback time allocated weekly		

**Now take your top tasks from the table above (no more than 3) and transfer them to your Flight Plan**

## What needs to be achieved in **TEAM** that will help you to achieve the High-Performance Challenge?

	Task Description	YES or NO	Items I will work on in the next 6 months
1.	We have a plan to grow our leadership group, so that I will no longer be needed in the day-to-day operations of the business		
2.	I have an up-to-date organisational chart		
3.	I have an organisational chart for what the business will look like in five years' time when we have doubled our revenue and have shared this with the team		
4.	Each team member understands how their achievements will be measured, i.e. via Key Performance Indicators (KPIs)		
5.	I hold weekly functional team meetings (e.g. Finance/Sales/Operations/Marketing/Management), which result in accountable actions with measurable outcomes		
6.	I delegate to my team and empower them to make decisions that benefit the business		
7.	We have a documented recruitment process for each role in the business		
8.	Every team member understands what their roles and responsibilities are		
9.	Our Culture has been identified, written down and shared with the team		
10.	I have weekly meetings with key team members and have a structured performance management process		
11.	I have a documented induction and ongoing training process for all team members		
<b>**Flight Plan 6+ options</b>			
12.	Management team design and progression a weekly focus		
13.	Questions vs Listening ratios improving and scoreboard driven. (Vs emotions)		
14.	Talent Mapping of all roles in the business are up to date		

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## What needs to be achieved in **SALES & MARKETING** that will help you to achieve the High-Performance Challenge?

	Task Description	YES or NO	Items I will work on in the next 6 months
1.	The sales team undertakes regular sales training		
2.	All our clients have been graded as A, B, C or D		
3.	I have a systemised referral strategy in place, and it is being tested and measured		
4.	I have identified my target market and market specifically to them – everything we do in marketing and sales is about them		
5.	I actively work with 3 non-competing Strategic Alliances who target the same market as I do		
6.	I have a structured 7 step (multi step) sales process and I measure the conversion rate and timeline between each step		
7.	The team use sales scripts and processes that are communicated and committed to by everyone on the team		
8.	I am actively using a minimum of 5 different ways to generate leads in the business, and they are all tested and measured		
9.	Our Quote Register and follow up process is updated weekly		
10.	The business has a database of clients and prospects, and we contact them at least every 30 days with offers and information		
11.	We have monthly / quarterly sales targets that are communicated and committed to by everyone on the team		
<b>**Flight Plan 6+ options</b>			
12.	ITM is GP% driven and I review our Quotes Register weekly in the % of jobs / client's growth		
13.	Rule of 3's mastery is overlaid within our Sales Process and tested and measured		
14.	Resourcing our Leadflow team is driven via scoreboards and constant activities we are executing within ROI plans		

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## What needs to be achieved in **FINANCE** that will help you to achieve the High-Performance Challenge?

	Task Description	YES or NO	Items I will work on in the next 6 months
1.	I have a Cashflow Forecast for the business (13 weeks minimum) and monitor it weekly		
2.	I have a minimum of 3 strategies in place to increase the Gross Profit		
3.	I know my Cost Per Lead and Acquisition Cost by lead source		
4.	I know how many sales, customers, or dollars I need to make per day / week or month to Breakeven inclusive of a minimum profit		
5.	I read and understand the monthly BBG financial report and have minimum of two areas that I am constantly working on to improve my net cash position in six months' time		
6.	I have an annual marketing plan that is Budget driven		
7.	I know the % Gross Profit (GP) that I make on every sale		
8.	I budget for Profit and have set daily / weekly / monthly profit goals		
9.	I set time aside at the end of each month to review my key numbers and business performance		
<b>**Flight Plan 6+ options</b>			
10.	I have a 52-week rolling Cashflow Forecasting which includes QR and WIP and it is reviewed weekly		
11.	Seven levers to a profitable model strategy/ies are being executed within the 90-day plans		
12.	Pricing and business models constantly reviewed and measured		

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## What needs to be achieved in **OPERATIONS** that will help you to achieve the High-Performance Challenge?

	Task Description	YES or NO	Items I will work on in the <b>next 6 months</b>
1.	We regularly survey our customers to determine how we can better serve them		
2.	All tasks that can possibly be automated have been, and the team are responsible for delegating more tasks to automation as appropriate		
3.	There are documented flow charts / procedures in place to ensure every customer experience is the same		
4.	The business analyses its mistakes, and we take active steps to ensure the error cannot occur again by upgrading our systems		
5.	We consistently review our cost and way of doing business and are looking for improvements in efficiencies whether that is people or machines		
6.	The business has defined customer service levels that all team members are aware of and are monitored against		
7.	We consistently brainstorm as a team, ways to exceed our customer expectations		
<b>**Flight Plan 6+ options</b>			
8.	Client and team lifetime value scores are confirmed, and improvement plans are being actioned		
9.	Team capacity and utilisation is 85% weekly / monthly and reviewed constantly		
10.	'A' grade client ratio of total clients is at 65% + by jobs and dollar value invoiced		
11.	The business is working on an updated version of the Operations 'Bible' for all areas in the business		

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**Notes:**