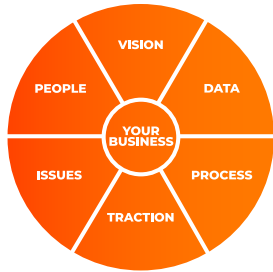


THE VISION/TRACTION ORGANIZER™

Organization Name: _____

VISION

CORE VALUES	1. 2. 3. 4. 5.	3-YEAR PICTURE™
CORE FOCUS™	Purpose/Cause/Passion: Our Niche:	Future Date: Revenue: Profit: Measurables:
10-YEAR TARGET™	_____ _____	What does it look like? - -
MARKETING STRATEGY	Target Market/The List™: 3 Uniques™: 1. 2. 3. Proven Process: Guarantee:	- - - - - -



THE VISION/TRACTION ORGANIZER™

Organization Name: _____

T R A C T I O N

1-YEAR PLAN	ROCKS	ISSUES LIST																
Future Date: Revenue: Profit: Measurables: Goals for the Year: 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____	Future Date: Revenue: Profit: Measurables: Rocks for the Quarter: <table border="1"> <thead> <tr> <th></th> <th>Who</th> </tr> </thead> <tbody> <tr><td>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> </tbody> </table>		Who	1. _____		2. _____		3. _____		4. _____		5. _____		6. _____		7. _____		1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____ 9. _____ 10. _____ Prioritize - Identify - Discuss - Solve
	Who																	
1. _____																		
2. _____																		
3. _____																		
4. _____																		
5. _____																		
6. _____																		
7. _____																		

ORGANIZATIONAL CHECKUP

For each statement below, rank your business on a scale of 1 to 5 where 1 is weak and 5 is strong.

	1	2	3	4	5
1. We have a clear vision in writing that has been properly communicated and is shared by everyone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Our core values are clear, and we are hiring, reviewing, rewarding, and firing around them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Our core business is clear, and our systems and processes reflect that.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Our 10-Year Target™ is clear and has been communicated to everyone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Our target market is clear, and our sales and marketing efforts are focused on it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Our differentiators are clear, and all of our sales and marketing efforts communicate them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. We have a proven process for doing business with our customers. It has been named and visually illustrated, and everyone is adhering to it.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. All of the people in our organization are the right people.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Our accountability chart (organizational chart of roles and responsibilities) is clear, complete, and constantly updated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Everyone is in the right seat.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Our leadership team is open and honest, and demonstrates a high level of trust.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Everyone has Rocks and is focused on them (3 to 7 priorities per quarter).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ORGANIZATIONAL CHECKUP

	1	2	3	4	5
13. Everyone is engaged in regular weekly meetings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. All meetings are on the same day and at the same time each week, have the same printed agenda, start on time, and end on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. All teams clearly identify, discuss, and solve key issues for the greater good and long term.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Our systems and processes are documented, simplified, and followed by all.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. We have a system for receiving regular customer and employee feedback, and we know their level of satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. A Scorecard for weekly metrics and measurables is in place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Everyone in the organization has a number.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. We have a budget and are monitoring it regularly (e.g., monthly or quarterly).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total number of each ranking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	x1	x2	x3	x4	x5
Multiply by the number above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add all five numbers to determine the percentage score that reflects the current state of your company %.