



**CEO COACHING®**  
international

# Mobilize Your Team in 2022

The 4-Step Guide



## Envision December 31, 2022. All your employees, friends, family, everyone has gathered to celebrate a successful year, your company's BIGGEST year yet.

You are popping champagne, eating cake, and handing out well-earned bonuses to your team. You are all celebrating because you achieved...what? Why was the year such a huge success? What was the #1 goal you set that you crushed by the end of the year?

If you're like the hundreds of growth-minded CEOs we coach, there are some BIG things you want to accomplish this year. Whether you're a seasoned pro or a newly-minted chief executive, the job remains the same: You need to lead the company ship by charting the course, mobilizing your crew, and making tough calls through choppy seas to reach the shores of extraordinary success.

Think of this e-book as your captain's guide. It's organized around the four key questions laid out in my first book, "Make BIG Happen":

- **What Do You Want in 2022?** (Vision)
- **How Will You Get There?** (Action)
- **What Could Get in the Way?** (Anticipate)
- **How Will You Hold Yourself Accountable?** (Measure)

Layered in are some of the Tools we introduced in

our second book, "Making BIG Happen", to provide you with actionable tips and resources you'll be able to reference all year to drive execution on the activities that lead to BIG growth and success in your business. We hope this small taste of the proven methodology that CEO Coaching International has used to help over 850 companies reach extraordinary revenue and EBITDA growth can help you too.

If you have questions as you read the e-book, or a particular business challenge comes up that would be helpful to talk through with someone who has been in your shoes, our world-class coaches, all battle-tested former CEOs, Founders, and Presidents—are on standby to provide you with two free coaching sessions. They can help you come up with an action plan to tackle everything from under-performing team members to sales issues, family-business dynamics, and more.

[Visit ceocoachinginternational.com/freecalls](https://ceocoachinginternational.com/freecalls) to redeem your free calls.

Thank you. Here's to Making BIG Happen in 2022.  
Sincerely,



Mark Moses  
CEO and Founding Partner  
CEO Coaching International





# 1 vision

**1. Vision** | What Do You Want to Accomplish in 2022?



## 1. Vision | What Do You Want to Accomplish in 2022?

Though it seems like a simple question, many CEOs struggle to dig down into the specifics of what they want and properly articulate that vision to the larger team. Annual goals such as: “expand the company internationally” or “increase revenue” are not going to cut it when it comes to developing a vision that your team can execute on. What exactly do you mean by “increase revenue”? Do you want the team to best last year’s revenue by 5%? Or, do you want them to increase it by 10-fold? If you don’t know exactly where you’re going, how can you expect your team to get there?

At CEO Coaching International, we use the Crystal Ball Exercise to help leaders stop and consider 1. What goals they want to accomplish and 2. The specific and measurable leading activities that will get them there.

### Crystal Ball Step 1: What do you want to accomplish?

To start, pull up our [Crystal Ball Exercise located in this e-book](#). What outcome are you celebrating on New Year’s Eve? This outcome — what you want — should be specific and measurable. Avoid anything too vague or activities masquerading as outcomes (e.g., “implement a customer experience division to increase customer retention”). While this is an attribute of a fantastic company focused on customer experience, these answers do not reflect an overarching specific and measurable goal for the year. This is an activity that a company might leverage to get there.

A better specific and measurable outcome would be something like: “Reduce customer churn from 30% to 7%.” It’s clear, it’s to-the-point, and it lets your team know exactly what they’re on the hook for.

### Crystal Ball Step 2: How will you get there?

Spend some time on Step 1, continuing to refine and revise. You’ll likely get to a place where you’re able to define what you want and where you want your business to be in a year.

Now it’s time for the hard part: identify the steps needed to realize that vision. Seeing the future and setting the target is not good enough. The necessary processes will not just work themselves out over the course of the year. Trusting your C-suite and team leaders to know what they’re supposed to do even though deep down you know you are expecting A work from B and C players, is a mistake.

To mobilize your team, you need to tell them how they will get where you want to go. Like the very goal

*“If you don’t know where you are going, you will probably end up somewhere else.”*

— Lawrence J. Peter

you set, the activities you and your team commit to in order to achieve your goal must be specific and measurable.

To reduce customer churn from 30% to 7%, what will you do? The answer to your question cannot be “lose fewer customers” – that answer is a regurgitation of your outcome. More appropriate specific and measurable activities would outline how you intend to lose fewer customers.

For example, we’ll institute quarterly check-ins with every customer, or every customer who gives us a rating of 7 out of 10 or below on our annual survey will be contacted by our Customer Success team within one week to determine how we can improve their experience.

Once you’ve completed the Crystal Ball Exercise, congratulations! You’ve completed the first step to mobilizing your team in 2022. You know what you want and what you need to do to get there. Next, you’ll need to communicate this to your team, inspire them to move together toward this goal, and put in place a system and the right team to get it done.







## 2. Action | How Will You Get There?

# Action

## 2. Action | How Will You Get There?

### Focus Your Leadership Team on **Quarterly Outcomes**

At CEO Coaching International, we have a saying: “The process doesn’t change — only your problems do.” A key to mobilizing your leadership team and getting where you want to go together is committing to a regular cadence of healthy business practices and meetings designed to secure alignment and commitment to action.

We’ve guided hundreds of CEOs through the multitude of business challenges leaders face. This fact always remains true: Maintaining a disciplined routine of structured meetings, along with methods of measurement and systems of accountability, helps leaders provide clarity, direction, and inspiration to their employees in both blue skies and stormy seas (including the COVID-19 pandemic).

One meeting key to keeping the team laser-focused and on track toward your goal for the year is the Quarterly Planning Session. Done correctly, this collaborative planning Session can help the leadership team achieve alignment, move from strategy to execution, and produce sustained quarter-over-quarter revenue and EBITDA growth toward your annual goal.

*“We are what we repeatedly do.  
Excellence, then, is not an act, but a habit.”*

— Will Durant, American writer, historian, and philosopher

Before your Quarterly Planning Session, you should have already held an Annual Planning Session and aligned on priorities and initiatives with your leadership team.

If you haven’t already held this Session with your executive team, get it on the calendar now. Even if it’s the middle of July, do not wait until the end of the year to do one. It’s the single most important meeting you’ll ever have on your calendar and will provide the North Star for your company’s 2022. Done well, it will set the stage for explosive growth and BIG accomplishments.

For tips on how to hold an effective Annual Planning Session, [download our e-book: 15 Steps to a Winning Annual Planning Session.](#)

After the Annual Planning Session, your executive team should commit to breaking your efforts toward that annual goal down into 13-week sprints. Think of the Annual Planning Session as the elephant and your 13-week marches as quarterly, bite-sized chunks. Your **Quarterly Planning Session** should be all about digging in and getting granular about progress on your initiatives to optimize for the next quarter.

*“How do you eat an elephant?  
One bite at a time!”*

— General Creighton Abrams, World War II Captain



By the time you leave the meeting, you and your executive team should be aligned on your goals and initiatives for next quarter and commit to driving forward together.





## Before the Meeting

We have found the following preparations result in a more productive session:

### Assign Pre-Work

Collecting executive team members' perspectives can keep the team focused, engaged, and produce a more effective session. These questions will be reviewed in the meeting during the Quarterly Review.



Find more on the Make BIG Happen System, pre-work, and helpful Quarterly Planning Session Tools in our new book, *"Making BIG Happen"*. [Learn More](#)

### Hire a Facilitator

When a CEO runs a Quarterly Planning Session, we have often found that participants consciously or subconsciously feel compelled to agree with the boss. Participants who are further down the chain will be less inclined to voice their honest opinions, which limits the free-flowing exchange of ideas and feedback you need for a successful session. Facilitating also forces the CEO to constantly switch back and forth between being the organizer and being a meaningful participant, to the detriment of both responsibilities.

## During the Meeting

An effective Quarterly Planning Session looks something like this:

### 1. Introduction

Great leaders care deeply about their teams. Check in with them and determine if there is any misalignment. Then, set the agenda and set expectations for the day.

We've also found it's helpful to start this session by addressing employees. This is a great time to reinforce the company's core values and to acknowledge and recognize the superstars in your organization who have gone above and beyond and exemplified what is best about your company. It's also the time to discuss and evaluate teams to ensure the right people are doing the right things to work toward your quarterly goals. For this, we recommend the Make BIG Happen Topgrading Exercise.



Teams with the courage to fail, learn from it, and move forward, are the teams with the resilience and fire to Make BIG Happen.

### 2. Quarterly Review

Next, you'll visit pre-work, and take a granular look at the progress toward your goals and current initiatives and ask:

1. What is working?
2. What is not working?
3. Were there any learnings from the previous quarter?
4. What will the team commit to in the next quarter to keep driving toward our BIG goal for 2022?

**Remember** – it's important that the team identifies opportunities that have already proven fruitful and will keep moving the needle, and has the courage to push past superficial answers to determine the root cause of any issues. Dig deep, ask questions, and remain ruthlessly committed to asking "why?" Do not get hung up on failures from the prior quarter — use them as fuel to adjust and do better in the next quarter.



### 3. Review Your Cash Bridge Dashboard

Cash is king, and as CEO, monitoring cash is one of your top responsibilities.

The Cash Bridge Dashboard is designed to analyze and interpret the impact of multiple variables on your cash flow in real time. It is used to build a strategy to extend your cash runway – the number of months of cash you have on hand – or to boost free cash flow to fund a growth initiative.



Your Cash Bridge dashboard is an “early warning system”

Think of this dashboard as an “early warning system” that will help you validate cash flow assumptions or alert you to potential “growing broke” scenarios. The Cash Bridge Dashboard also provides long-term visibility of your cash flow so that you can keep it aligned with achieving your long-term targets.

### 4. Determine Next Quarter’s Initiatives

Now, it’s time to synthesize the learnings from the previous quarter and come up with new quarterly goals and initiatives that will keep you, your leadership team, and their direct reports on track to hitting your BIG annual goal.

First, take your annual goals and initiatives and break them down into four steps – one step for each quarter.

Then, work on completing each step over the course of four quarters. A BIG goal does not look as daunting when it is broken down into four specific and measurable steps. Base the next quarter’s initiatives and key activities on what happened the prior quarter.

Finally, it’s time to determine the initiatives for the quarter. These must:

- Lead to achieving the corporate initiatives
- Be significant and focused
- Be inspiring
- Be specific and observable

If you successfully complete a Quarterly Planning Session, we commend you — you’re one step closer to Making BIG Happen this year. Communicate your plan to the larger team and march forward together toward your BIG 2022 goal.

### Make Sure You Have the Right Team to Get Where You Want to Go

The best leaders are ones that make time to think ahead. Beyond knowing what you want this year, you should have one or two Huge Outrageous Targets (HOTs) that you consider in every decision you make. Everything you do should work toward your HOT. A HOT should be a goal so big and outrageous that it sparks a fire in the team and is rocket fuel to propel them to think BIG and Make BIG Happen.

*“What got you here won’t get you there.”*

— Marshall Goldsmith

While commitment to Healthy Business Rhythms is a crucial habit of high-performing teams, it will not be a cure-all or the magic bullet. To Make BIG Happen, you need the right A-players by your side, the team that will get you where you want to go.

Our **Organization of the Future Tool** is a disruptive way of looking at your business that can help you accelerate key hires and upgrades now so you’re setting yourself up to reach your next big goal.

Assuming you have achieved your HOT, take a look at the team that got you there. Like many of our clients, we’re willing to bet the





org chart and the leadership team look different than the one you have now. On your Organization of the Future chart, consider the roles you will need in your company's ideal state, including additions, shifts, and replacements. Then, determine key considerations for each role that will inform the recruiting and hiring process. Ask yourself what experience each leadership role will require and any challenges that individual will likely face.



**However far out tomorrow is, it will be BIGGER if you start today.**

Next, make time for you and your leadership team to proactively interview at least two people for these roles weekly, even if there are no positions open. This will help you do the following:

- Expand your horizons beyond the here and now
- Provide you with inspiration from candidates to solve the problems of today
- Keep your current leadership team from complacency
- Help you capitalize on talent opportunities

Even though you already have plenty on your plate to mobilize your team and reach your goal for 2022, we always recommend our clients break out of linear thinking and move toward exponential thinking.

However far out tomorrow is, it will be BIGGER if you start today and continually stay on the hunt for talent that will add firepower to your business.

With your quarterly initiatives under your belt and a relentless focus on finding your next A-player, you're well on your way to Making BIG Happen this year. But as all leaders know, nothing is ever as easy as it seems.







# Anticipate

3. Anticipate | What Could Get In The Way?



### 3. Anticipate | What Could Get In The Way?

Imagine this scenario: You join your team's Zoom meeting. After a few minutes of friendly chit-chat, the conversation starts circling a vague objective that's never discussed in any meaningful way. Nothing gets decided, no one is assigned ownership, and everyone closes out the Zoom window muttering about how much time they just wasted. Does this sound familiar? A meeting like that stops any efforts to get anywhere dead in its tracks.

While some obstacles are massive, like pandemic-related supply chain issues that delay crucial components in your technology, or a data breach that compromises your entire customer database, others, like those mind-numbingly pointless Zoom meetings, are commonplace issues. Though an obstacle like this may seem small, it can spell D-A-N-G-E-R. These challenges require awareness and discipline to ensure they do not get out of hand and threaten to bring down your dreams for 2022.

#### Promote laser focus by running more effective meetings

According to a 2018 study by the Harvard Business Review, CEOs of large companies (an average of \$13 billion in revenue) attended 37 meetings per week and spent 72% of their total work time in meetings. That is a lot of wasted time if you are not doing meetings right.

At CEO Coaching International, we recommend making your meetings “rapid,” or RPID. This four-part framework helps CEOs create a rigorous, clear, and regular cadence for efficient communication that keeps all levels of the business aligned toward Making BIG Happen.

Here's what an effective RPID weekly leadership meeting looks like, in 60 minutes or less:

#### Results

Start the meeting with a team review of progress you are trying to achieve, by tracking the metrics that are most critical to reaching

*“The hard truth is, bad meetings almost always lead to bad decisions, which is the best recipe for mediocrity.”*

— Patrick Lencioni



your goal on your Company Dashboard (more on that later). Make sure everyone understands where your numbers are and where they should be.

Then, go beyond the metrics and ask “why?” Why are some KPIs up or down? What do you need to do in order to reverse negative trends



or accelerate positive ones? Once the team gets into the habit of asking these key questions, you've made the first step toward holding more effective meetings.

### Progress

Give each leader two or three minutes—at a max—to report on how his or her department is moving these key metrics forward. At this stage of the meeting, you only want to focus on the progress being made on the leading activities that will lead to the outcomes you want.

### Issues

Next, go around the room and ask each leader if they have any issues they need to address. The objective here is to build an action list, not solve everybody's problems or take anyone to task for falling short. Let everyone share the surface obstacles that are or could get in the way of achieving your goals.



### Discussion

After every leader has raised their issues, take a look at the action list that's emerged from the previous three steps. Select the one or two most pressing concerns that are directly related to progress on KPIs. Do not adjourn until the team has:

- Identified actionable next steps that will resolve key issues
- Set a deadline for when those steps need to be executed
- Assigned responsibility

Effective meeting hygiene should be practiced at every meeting and by every member of the company. An ingrained habit like that begins with cultivating a strong culture — one that inspires exceptional performance and is steeped in accountability.

*“Culture eats strategy for breakfast.”*

— Peter Drucker

### Reinforce Your Company's Core Values to Prevent the “Big Quit” from Top Talent

Imagine that integrity is one of your company's core values. It's listed on your website, it's in your recruiting materials, and it's part of the new employee on-boarding presentation. Now imagine that your top salesperson acted in a way that was unethical. Would you fire them? If you feel conflicted or unsure about whether to overlook the transgressions, can you really say that integrity is one of your company's core values?

Like vision, core values are a fundamental part of a company's identity. Though they are a foundation of your company, they're something that must be reinforced each and every day. A leader who communicates core values must live them out. Companies that undergo a thoughtful process to develop values they believe in and bring them to life from the top down consistently are those that make an extraordinary and lasting impact.



*You may find our Core Values Builder Tool particularly useful when building the foundation of your company culture.*

**GET THE TOOL**

Nothing thwarts progress toward mobilizing a team and achieving BIG results like a company culture that has employees looking for the exit





sign. Company culture is a foundational aspect of your company's core identity. Done well, culture will accelerate your progress toward Making BIG Happen. Done poorly, it will result in an unmitigated disaster.

If you've been blaming the challenges you're having in the employee hiring and retention department this past year, it's time to reframe your mentality. Employees are not leaving your company because the "Great Resignation" is in vogue. They're leaving your company because your company is not fulfilling their needs, and the antidote to that, a strong culture, starts with you as the leader.

**Making bad hires can be a costly mistake. Taking time on the front end to hire well can save you money and precious time.**



While combating the "Big Quit" has been a particularly acute issue in the turbulent age of COVID-19, building a company culture is essential regardless of the climate and can generate a huge return on investment.

At CEO Coaching International, we have found that leaders who maintain the following habits build high-performance cultures with the resiliency and accountability to Make BIG Happen.

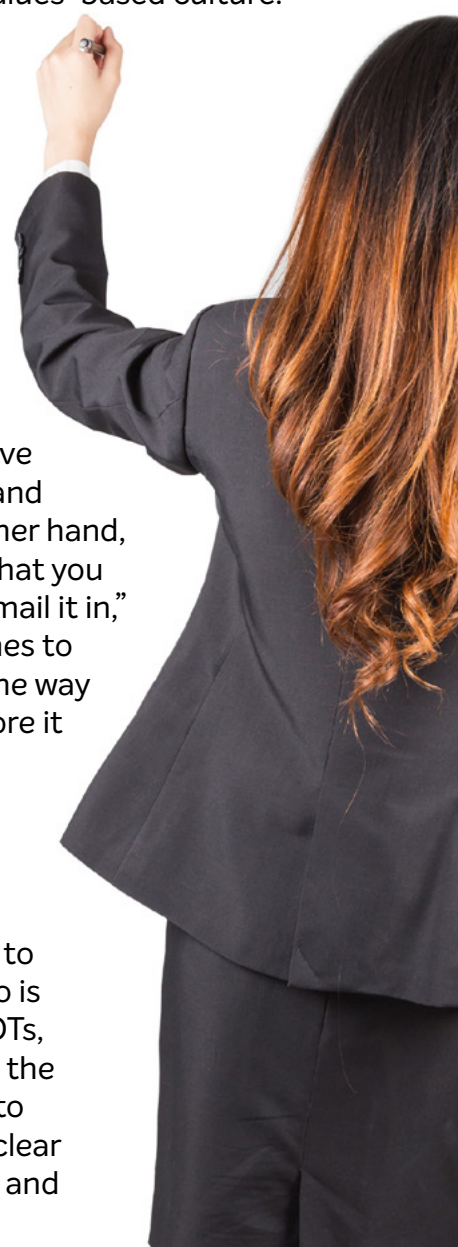
### **Determine your values and stick to them**

Like the integrity example, many companies we work with at CEO Coaching International struggle to establish a values-based culture. Values are not simply a box to be checked. These values must be communicated and lived by everyone on the team, consistently including you.

Executed correctly, values provide a powerful framework for decision-making and drive employee engagement and performance. On the other hand, we do not recommend that you assert your values and "mail it in," so to speak, when it comes to living them out. That's one way to tank your culture before it gets off the ground.

### **Select the right people to join your organization**

Just as getting the right people in the right seats to get where you want to go is key to achieving your HOTs, so is making sure you let the right people in the door to begin with. Once you're clear on your company values and



## **Core Value Focus: TaskUs Surveys Staff Every Quarter**



Our long-time client TaskUs measures employee experience using an Employee Net Promoter Score, which is a survey that they send to their global workforce every quarter, asking one key question: "How likely are you to recommend TaskUs as a place to work for your friends and family?" TaskUs and its leaders are repeatedly recognized for excellence and celebrated a successful IPO in June 2021.

### **CASE STORY**



committed to showing that to your employees, you're ready to make hires.

When considering a key hire, ask the right questions like:

- *What business values are important to you?*
- *What's your impression of our culture, and what do you like/dislike about it?*
- *Tell me about a prior work experience where you were not a strong cultural fit. Why was it a bad fit?*

With thoughtful probing, you'll improve your odds of hiring people who are a cultural fit, and it will benefit you. Making bad hires can be a costly mistake. Taking time on the front end to hire well so you don't pay for it on the back-end can save you money and precious time mobilizing toward your 2022 goals.

### **Be flexible**

In the age of COVID, flexibility is a buzzword we often hear as it pertains to employees' expectations around their working situation—flexibility to work remotely, flexibility to work compressed weeks, sabbaticals, etc.

While flexibility can pertain to in and out of office arrangements, it transcends the remote work debate. Leaders must listen to their workforce to understand what they are requesting, ask why, understand fundamental needs, and accommodate those as appropriate.

Employees are your company's most valuable asset. As the leader, it is in your best interest to listen and take action. We find our Culture Survey Tool to be particularly helpful with this.



**Employees are your company's most valuable asset. As the leader, it is in your best interest to listen and take action. We find our Culture Survey Tool to be particularly helpful with this.**

**GET THE TOOL**

This Tool allows a CEO and the leadership team to determine the strengths and weaknesses in their company culture as reported by their employees. It can help you understand how well your company is delivering in eight key areas of a healthy culture, including core values.

When you review the results, you can determine if you have the right culture to take you where you want to go or if you need to go back to the drawing board.

By checking your company's pulse and setting a benchmark for the future, you'll be able to accelerate your company's strengths, eliminate weaknesses, and continue forward on your journey to Make BIG Happen this year.







## 4. Measure | How Will You Hold Yourself Accountable?

# Measure

## 4. Measure | How Will You Hold Yourself Accountable?

### A Snapshot of Progress — The Company Dashboard

You've ingrained healthy meeting habits throughout the organization. Check. You've cultivated a culture that attracts and retains A-players. Check. Now, there's one more key ingredient you need to mobilize your team and Make BIG Happen this year: accountability. In order to create an environment that fosters accountability and rewards those behaviors that will lead to the results you are trying to achieve, you must religiously track and measure the results toward your quarterly and, ultimately, annual goals. In the words of Bob Proctor, "Accountability is the glue that ties commitment to the result."

At CEO Coaching International, we are big fans of the Company Dashboard. [The Company Dashboard Tool](#) is a summary-level display of the company's goals, initiatives, and KPIs most critical to success.

It provides an up-to-the-minute window into how the business is progressing, where it could be lagging, and which levers you can pull to get where you want to go more quickly and efficiently.

Even better, a good dashboard keeps everyone in your company on the same page. Tracking the right numbers and making them visible demonstrates your commitment to transparency and inspires each worker to be accountable for keeping those numbers trending in the right direction.

A Company Dashboard allows you to:

- **Know what is happening in your business** so you can cut through the daily whirlwind, organize the chaos, and gain a sense of control and understanding of your business.
- **Identify problems early.** If you measure only results, you risk missing problems that are brewing under the surface along the way toward achieving your desired outcome. It is much better to have an accountability system in place to detect problems early and address the root causes of those problems.
- **Motivate your leaders.** When people know they are accountable for their actions and results, they will put more effort into reaching them. If they do not perform, there is nowhere to hide.
- **Test and learn—quickly.** With the right variety of measures, you can be more open to experimentation because you can directly assess the results of your initiatives, scrap the bad ones, and expand the good ones without wasting time.

*“Accountability breeds response-ability.”*

— Stephen Covey

Once you have a system in place to track progress and focus on accountability throughout your organization, you've made a great start. In our experience coaching hundreds of companies across the world, however, leadership teams that also commit to regular accountability sessions themselves are the ones that bring their games to a whole new level.



### Everybody Needs a Coach

Former Google CEO Eric Schmidt once famously said: “Everybody needs a coach,” and at CEO Coaching International, we wholeheartedly agree.





Of course, we're a bit biased about the importance of an accountability partner for leaders and their executive teams because it's what we do each day.

But we coach because we have all experienced firsthand the BIG results that come from commitment to an accountability partner, as former CEOs, Founders, and Presidents who have been coached ourselves, and as coaches to some of the world's most accomplished leaders today.

We recommend twice-per-month one-on-one sessions with a leadership coach. At CEO Coaching International, we fulfill this role with several hundred CEOs and their leadership teams.



*"Everybody needs a coach... every famous athlete, every famous performer has somebody who is a coach. The one thing people are never good at is seeing themselves as people see them. A coach really helps."*

— Eric Schmidt – Google

By working with someone outside of your organization, you'll get a perspective from a been-there-done-that leader who understands your position but isn't mired in the day-to-day distractions and tunnel vision that often creeps into even the most well-intentioned executive teams. A world-class coach will keep you and your team accountable by keeping you honest about what you say you're going to do and help you neutralize shiny objects that threaten to drive you off track.

In addition to serving as a sounding board, your accountability partner should include time for in-depth diagnostics around what is going right or wrong in your plan, and to help you push through any challenges that may arise, prioritize commitments, and make key pivots necessary to continue making progress week to week.

In these coaching sessions, you should:

- Review metrics related to the activities and outcomes behind your quarterly, annual, and long-term HOTs.
- Review commitments made in the last accountability meeting. How did you do with those commitments? Did they have an impact? How do you know?
- Discuss any new topics that could affect your quarterly, annual, and long-term HOTs.
- Determine any new commitments you will be making that you will complete between now and your next meeting.

If you've committed to working with a coach to keep yourself accountable, we commend you. By maintaining bi-monthly accountability meetings, you can navigate your challenges of any magnitude, and mobilize your team toward your company's BIGGEST year yet.





We wish you luck on your Make BIG Happen journey and hope this e-book has been a resource for you. If you would like more information on our Tools, the Make BIG Happen System, or are interested in purchasing your copy of “Making BIG Happen”, visit [ceocoachinginternational.com/makingbighappen](https://ceocoachinginternational.com/makingbighappen) for more information.

If you have questions or want to talk through your business challenges, remember — our world-class coaches, all battle-tested former CEOs, Founders, and Presidents, are on standby and offering two free coaching sessions to you.

Get in touch today to experience what coaching can do for you, your leadership team, and your entire business. Visit [ceocoachinginternational.com/freecalls](https://ceocoachinginternational.com/freecalls) to redeem your calls and learn more about our coaches.

CEO Coaching International works with CEOs and their leadership teams to achieve extraordinary results quarter after quarter, year after year. Known globally for its success in coaching growth-focused entrepreneurs to meaningful exits, CEO Coaching International has coached more than 875 CEOs and entrepreneurs in more than 45 countries and industries. The coaches at CEO Coaching International are former CEOs, presidents, or executives who have made BIG happen. The firm’s coaches have led double-digit sales and profit growth in businesses ranging in size from startups to over \$10 billion, and many are founders that have led their companies through successful eight, nine and ten-figure exits. Companies working with CEO Coaching International for three years or more have experienced an average EBITDA CAGR of 30.4% during their time as a client, more than three times the U.S. average and a revenue CAGR of 18.6%, nearly twice the U.S. average.

**BIG Happens Here.**







CEO COACHING<sup>®</sup>  
international

Make BIG Happen Tool  
**THE CRYSTAL BALL  
EXERCISE<sup>®</sup>**

You look into a **Crystal Ball** and can see into the future to the end of next year. A great year is ahead of you! Write down what you see.

### STEP 1

The year you envisioned has now come and gone. We are celebrating the year because we achieved the following specific and measurable **outcomes**.

### STEP 2

For each of the outcomes above, what are the top two specific and measurable **activities** you executed that made you achieve that outcome?



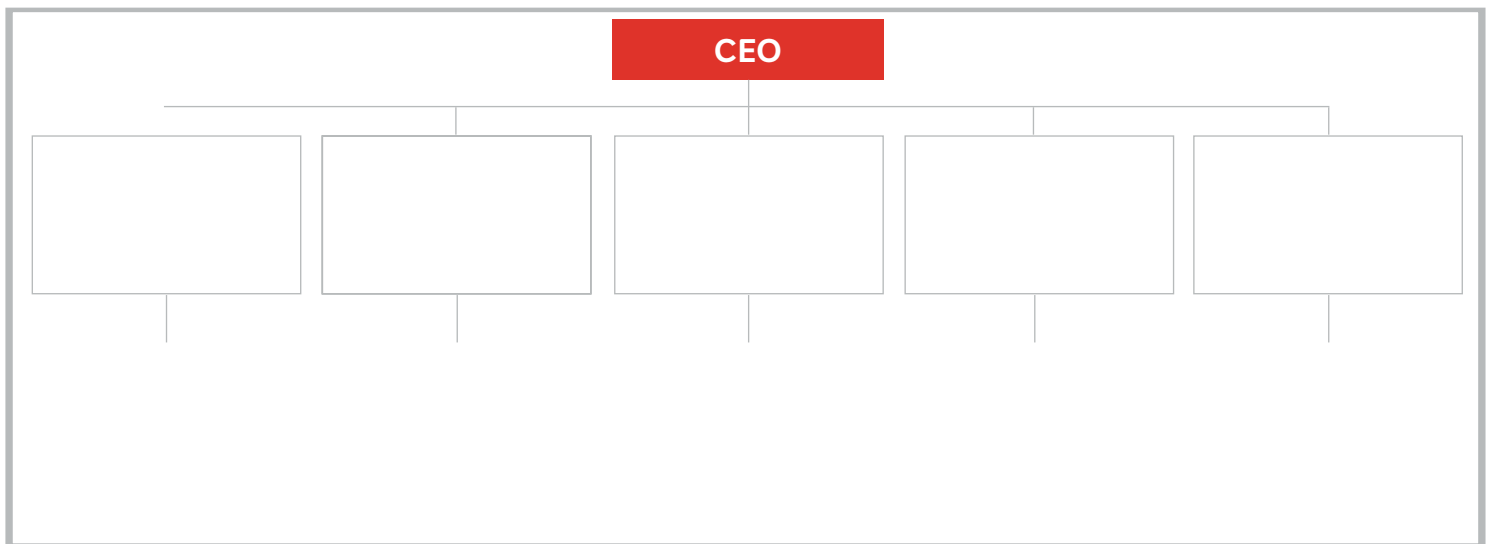
**CEO COACHING<sup>®</sup>**  
international

## Make BIG Happen Tool

# ORGANIZATION OF THE FUTURE

### STEP 1

Sketch the organizational structure that is necessary to achieve your long-term HOT. Focus on the roles required rather than the people that will fill them.



### STEP 2

For each position in the org chart, map out the following key considerations to prepare for an effective recruiting and hiring process.

ROLE	NECESSARY EXPERIENCE Ex: Managing sales teams in foreign markets; Enabling acquisitions	PROBABLE CHALLENGES Ex: Long lead times for overseas engineering; Supply chain inefficiencies	POTENTIAL OPPORTUNITIES Ex: Renegotiating lines of credit to free up cash; Being first to market	ANTICIPATED CONSTRAINTS Ex: Bureaucratic customer service culture; Traditional bank lending agreements





CEO COACHING<sup>®</sup>  
international

## Make BIG Happen Tool

# CORE VALUES BUILDER EXERCISE

### STEP 1

Place a check mark next to the values that you want your company to represent.

<input type="checkbox"/> Abundance	<input type="checkbox"/> Bravery	<input type="checkbox"/> Conviction	<input type="checkbox"/> Dynamism	<input type="checkbox"/> Fierceness
<input type="checkbox"/> Acceptance	<input type="checkbox"/> Brilliance	<input type="checkbox"/> Conviviality	<input type="checkbox"/> Eagerness	<input type="checkbox"/> Financial Independence
<input type="checkbox"/> Accessibility	<input type="checkbox"/> Buoyancy	<input type="checkbox"/> Coolness	<input type="checkbox"/> Economy	<input type="checkbox"/> Firmness
<input type="checkbox"/> Accomplishing	<input type="checkbox"/> Calmness	<input type="checkbox"/> Cooperation	<input type="checkbox"/> Ecstasy	<input type="checkbox"/> Fitness
<input type="checkbox"/> Accuracy	<input type="checkbox"/> Camaraderie	<input type="checkbox"/> Cordiality	<input type="checkbox"/> Education	<input type="checkbox"/> Flexibility
<input type="checkbox"/> Achievement	<input type="checkbox"/> Candor	<input type="checkbox"/> Correctness	<input type="checkbox"/> Effectiveness	<input type="checkbox"/> Flow
<input type="checkbox"/> Activeness	<input type="checkbox"/> Capability	<input type="checkbox"/> Courage	<input type="checkbox"/> Efficiency	<input type="checkbox"/> Fluency
<input type="checkbox"/> Adaptability	<input type="checkbox"/> Care	<input type="checkbox"/> Courtesy	<input type="checkbox"/> Elation	<input type="checkbox"/> Focus
<input type="checkbox"/> Adoration	<input type="checkbox"/> Carefulness	<input type="checkbox"/> Craftiness	<input type="checkbox"/> Elegance	<input type="checkbox"/> Forcefulness
<input type="checkbox"/> Adroitness	<input type="checkbox"/> Celebrity	<input type="checkbox"/> Creativity	<input type="checkbox"/> Empathy	<input type="checkbox"/> Fortitude
<input type="checkbox"/> Adventure	<input type="checkbox"/> Certainty	<input type="checkbox"/> Credibility	<input type="checkbox"/> Encouragement	<input type="checkbox"/> Frankness
<input type="checkbox"/> Affection	<input type="checkbox"/> Challenge	<input type="checkbox"/> Cunning	<input type="checkbox"/> Endurance	<input type="checkbox"/> Freedom
<input type="checkbox"/> Affluence	<input type="checkbox"/> Charity	<input type="checkbox"/> Curiosity	<input type="checkbox"/> Energy	<input type="checkbox"/> Friendliness
<input type="checkbox"/> Aggressiveness	<input type="checkbox"/> Charisma	<input type="checkbox"/> Daring	<input type="checkbox"/> Enjoyment	<input type="checkbox"/> Frugality
<input type="checkbox"/> Agility	<input type="checkbox"/> Charm	<input type="checkbox"/> Decisiveness	<input type="checkbox"/> Entertainment	<input type="checkbox"/> Fun
<input type="checkbox"/> Alertness	<input type="checkbox"/> Chastity	<input type="checkbox"/> Decorum	<input type="checkbox"/> Enthusiasm	<input type="checkbox"/> Gallantry
<input type="checkbox"/> Altruism	<input type="checkbox"/> Cheerfulness	<input type="checkbox"/> Deference	<input type="checkbox"/> Equity	<input type="checkbox"/> Generosity
<input type="checkbox"/> Ambition	<input type="checkbox"/> Civility	<input type="checkbox"/> Delight	<input type="checkbox"/> Excellence	<input type="checkbox"/> Gentility
<input type="checkbox"/> Amusement	<input type="checkbox"/> Clarity	<input type="checkbox"/> Dependability	<input type="checkbox"/> Excitement	<input type="checkbox"/> Giving
<input type="checkbox"/> Anticipation	<input type="checkbox"/> Cleanliness	<input type="checkbox"/> Depth	<input type="checkbox"/> Exhilaration	<input type="checkbox"/> Grace
<input type="checkbox"/> Appreciation	<input type="checkbox"/> Cleverness	<input type="checkbox"/> Desire	<input type="checkbox"/> Expectancy	<input type="checkbox"/> Gratitude
<input type="checkbox"/> Approachability	<input type="checkbox"/> Closeness	<input type="checkbox"/> Determination	<input type="checkbox"/> Expediency	<input type="checkbox"/> Gregariousness
<input type="checkbox"/> Articulacy	<input type="checkbox"/> Comfort	<input type="checkbox"/> Development	<input type="checkbox"/> Experience	<input type="checkbox"/> Growth
<input type="checkbox"/> Assertiveness	<input type="checkbox"/> Commitment	<input type="checkbox"/> Devotion	<input type="checkbox"/> Expertise	<input type="checkbox"/> Guidance
<input type="checkbox"/> Assurance	<input type="checkbox"/> Compassion	<input type="checkbox"/> Devoutness	<input type="checkbox"/> Exploration	<input type="checkbox"/> Happiness
<input type="checkbox"/> Attentiveness	<input type="checkbox"/> Completion	<input type="checkbox"/> Dexterity	<input type="checkbox"/> Expressiveness	<input type="checkbox"/> Harmony
<input type="checkbox"/> Attractiveness	<input type="checkbox"/> Composure	<input type="checkbox"/> Dignity	<input type="checkbox"/> Extravagance	<input type="checkbox"/> Health
<input type="checkbox"/> Audacity	<input type="checkbox"/> Concentration	<input type="checkbox"/> Diligence	<input type="checkbox"/> Extroversion	<input type="checkbox"/> Heart
<input type="checkbox"/> Availability	<input type="checkbox"/> Confidence	<input type="checkbox"/> Direction	<input type="checkbox"/> Exuberance	<input type="checkbox"/> Helpfulness
<input type="checkbox"/> Awareness	<input type="checkbox"/> Conformity	<input type="checkbox"/> Directness	<input type="checkbox"/> Fairness	<input type="checkbox"/> Heroism
<input type="checkbox"/> Awe	<input type="checkbox"/> Congruency	<input type="checkbox"/> Discipline	<input type="checkbox"/> Faith	<input type="checkbox"/> Holiness
<input type="checkbox"/> Balance	<input type="checkbox"/> Connection	<input type="checkbox"/> Discovery	<input type="checkbox"/> Fame	<input type="checkbox"/> Honesty
<input type="checkbox"/> Beauty	<input type="checkbox"/> Consciousness	<input type="checkbox"/> Discretion	<input type="checkbox"/> Family	<input type="checkbox"/> Honor
<input type="checkbox"/> Being the best	<input type="checkbox"/> Consistency	<input type="checkbox"/> Diversity	<input type="checkbox"/> Fascination	<input type="checkbox"/> Hopefulness
<input type="checkbox"/> Belonging	<input type="checkbox"/> Contentment	<input type="checkbox"/> Dominance	<input type="checkbox"/> Fashion	<input type="checkbox"/> Hospitality
<input type="checkbox"/> Benevolence	<input type="checkbox"/> Continuity	<input type="checkbox"/> Dreaming	<input type="checkbox"/> Fearlessness	<input type="checkbox"/> Humility
<input type="checkbox"/> Bliss	<input type="checkbox"/> Contribution	<input type="checkbox"/> Drive	<input type="checkbox"/> Ferocity	<input type="checkbox"/> Humor
<input type="checkbox"/> Boldness	<input type="checkbox"/> Control	<input type="checkbox"/> Duty	<input type="checkbox"/> Fidelity	<input type="checkbox"/> Hygiene



## Make BIG Happen Tool

# CULTURE SURVEY

### INSTRUCTIONS

- STEP 1** Have all employees take the survey anonymously.
- STEP 2** Discuss the input with your team to identify gaps in your current culture compared to your ideal culture.
- STEP 3** Develop new initiatives with clear deadlines as needed to improve the weaknesses.
- STEP 4** Have your employees take it every year to keep your finger on the pulse and continually improve your culture.

### THE SURVEY

CATEGORY	QUESTION	SCORE (1-10)
VISION	Is it clear and compelling?	
	Is the company aligned around it?	
MISSION	Is it authentic?	
	It is meaningful?	
CORE VALUES	How well do we live them out?	
	Do they guide our decisions?	
HOTS	Are they important?	
	Do we know why they're important?	
UNIQUE VALUE PROPOSITION	Is it significant?	
	Are we faithful to it?	
TEAM	Do we have the right people?	
	Are they in the right seats?	
COMMUNICATION	Is it clear and efficient?	
	Are we transparent and accessible?	
ACCOUNTABILITY	Do we measure our results?	
	Do we do what we say we're going to do?	





CEO COACHING<sup>®</sup>  
international

## Make BIG Happen Tool

# COMPANY DASHBOARD

Track your key performance indicators in a dashboard accessible by the whole team.

STEP  
1

Determine your key metric.

STEP  
2

Define your goal.

STEP  
3

Measure & track progress over time.

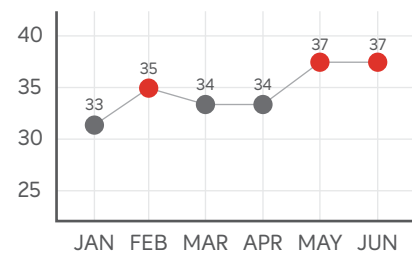
Date	Value

STEP  
4

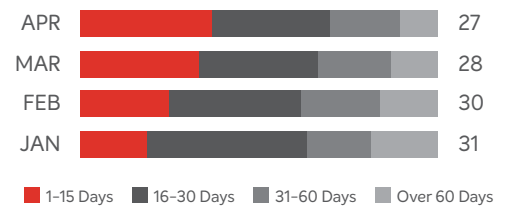
Coming Soon!

Automate, optimize and visualize your data using the Make BIG Happen online platform, available soon.

GROSS MARGIN



DAYS SALES OUTSTANDING



REVENUE

