

# Strategic Structure Overview

To grow your business to the level you desire, you need to focus on less, but what you focus on must matter more.

It's not about more—more hours, more effort, more control—rather, it's about better—better choices, better focus, better alignment.

Do fewer things, but make sure the things that you do matter more. Align your team and company resources around these priorities as well.

To make the shift to sustainably scale your business, you've got to make the tough choices about where to invest your team's limited resources of time, attention, and budget, and which things you simply can't do for now.

At its most basic form, your “strategic structure” is how your business rationally and effectively plans its pathway forward as you scale. It includes your annual planning to set goals and create your map for the coming year, quarterly planning to check in on progress and gain clarity for the coming quarter's action plan, and weekly execution and accountability to follow your quarterly action plan and get the results you want.

Essentially, the strategic structure you'll master as part of the coaching program is the organized formula through which you direct your team's best time, talent, money, and attention on your Fewer, Better. These are the small number of strategies, initiatives, opportunities, projects, customers, service offerings, or tasks that truly make a difference for your company. Just like you'll build your Time Value Matrix of A-, B-, C-, and D-level tasks for you as an individual, your Fewer, Better are your organization's A- and B-level activities. These are the things that create the most value for your company.

You'll start the year planning your big picture plan for your company (see “Our Annual 1-Page Strategic Action Plan” tool later in this section of your program binder).



As part of the Maui Mastermind Business Coaching Program, you'll absorb our proven strategic structure that has helped our clients grow five times faster than the average privately held company in North America.

**Our Annual 1-Page Strategic Action Plan**

Financial Drivers:	Target	Q1 Actual	Δ %	Target	Q2 Actual	Δ %	Target	Q3 Actual	Δ %	Target	Q4 Actual	Δ %	Target	Annual Actual	Δ %
Gross Sales (\$)	\$3 million	\$3.1 million	67%	\$2.5 million	\$2.5 million		\$1.5 million	\$1.5 million		\$3 million	\$3 million		\$10 million	\$10 million	
Gross Profit (\$)	\$2.1 million	\$2.1 million	19%	\$1.75 million	\$1.75 million		\$1.05 million	\$1.05 million		\$2.1 million	\$2.1 million		\$7 million	\$7 million	
GPM (%)	70%	71%	15%	70%	70%		70%	70%		70%	70%		70%	70%	
Operating Profit (\$)	\$600k	\$78k	28%	\$500k	\$500k		\$300k	\$300k		\$600k	\$600k		\$2 million	\$2 million	
OPM (%)	20%	24%	20%	20%	20%		20%	20%		20%	20%		20%	20%	
<b>Key Performance Indicators</b>															
KPI #1 Leads/month	4,000/month	4,150/month	3.4%	\$2.5 million	\$2.5 million		1,500/month	1,500/month		4,400/month	4,400/month		3,000/month	3,000/month	
KPI #2 Closing Rate	28%	30%	7.1%	\$1.75 million	\$1.75 million		32%	32%		35%	35%		35%	35%	
KPI #3 Referral Score	55 months	51 months	7.3%	70%	70%		58 months	58 months		60 months	60 months		60 months	60 months	
KPI #4 Cost of Sale	\$150/cust	\$150/cust	10%	\$50/cust	\$50/cust		\$150/cust	\$150/cust		\$150/cust	\$150/cust		\$150/cust	\$150/cust	
KPI #5 Avg. List of Sale	\$75/cust	\$75/cust	20%	20%	20%		\$85/cust	\$85/cust		\$85/cust	\$85/cust		\$85/cust	\$85/cust	
<b>Capability to Develop</b>	Learning to use our new CRM to increase efficiencies.			Continue learning to best use CRM to increase efficiencies.											
<b>Strategic Depth Step to Take</b>	Cross train 2 people (Tim and Sheila) on Production Scheduling System.			Hire and onboard second billing team member to work with Chris.											
<b>Message to Clean Up</b>	Attitude issue with Eric's field crew.			Right size contract premiums with Stephen...too much scope creep last 6 months.											
<b>Top Victory to Celebrate</b>	5 of 6 sales team members crushed their sales numbers.														
<b>Key Lesson to Build On</b>	In future, rep attitude issues for field teams in the field. We waited 6 months to address it.														

Example of our Annual 1-Page Strategic Action Plan tool.

Then, each quarter you'll step back to review your progress. As a coaching client, we recommend that you use the “Quarterly Review App” which you and your staff have access to through the Maui App online. This will guide you through the process of taking stock of your prior quarter's progress.

What were your biggest victories? What insights or lessons do you take from the quarter? How do you see yourself or your company applying these insights moving forward to generate even better results?

Where does your company stand in terms of strategic depth in each pillar of your company? These and other questions, which only take 30-45 minutes to answer, give you the framework from which to fashion your coming quarter's "Quarterly 1-Page Strategic Action Plan".

Your quarterly action plan will direct your team's best discretionary time and attention over the quarter to maximum effect. Think of this process as a rolling series of 90-day sprints you and your team will repeat, which cumulatively will lead you to astounding results.

Why all this emphasis on the "quarter"? Because the quarter is the perfect unit of time to bridge your big-picture goals and your weekly planning and daily actions. It's long enough that you can get meaningful work done to bring you closer to your long-term goals, but short enough that you can hold your focus and frequently course-correct.

For more than a decade, we've pushed our coaching clients to leverage our proprietary one-page format. Why one page, instead of two or twenty-twenty pages? Because we've learned from our work in coaching thousands of business leaders that, in the rush of the day-to-day, if your plan is two or three pages (or more), you just won't use it on a weekly basis to guide your execution.

With a one-page plan, you can see your whole plan at one glance. You'll review it every week to pull the next action steps into your weekly task list. You'll also easily be able to review key staff members' quarterly one-page Action Plans and hold them accountable on a weekly basis.

In essence, your one-page Action Plan becomes your quarterly and weekly GPS to make sure that your team is focusing on the right things and hitting key milestones on time. Think of it as a visual cue that glues your team's best attention on those things that matter most. It's the written allocation of where your team is investing its best discretionary time, talent, attention, and money. It will help align your team on big-picture priorities so everyone can better manage their responsibilities and contribute more to the real needs of the business.

Every quarter, you and your key leaders will step away from the day-to-day doing of your business in order to concretely map out the next ninety days. You'll lay out your top three strategic priorities for the coming quarter and write up a simple one-page plan of action specifying exactly what you must do that quarter to grow and develop your business. Over the course of the quarter, you'll invest your team's best discretionary time into your chosen Focus Areas and execute exceptionally well on your Action Plan. At the end of the quarter, you'll evaluate your results, celebrate your victories, and clarify your lessons. Then you'll plan out the coming quarter. Over time, as you repeat this process quarter-by-quarter you'll gather momentum and enjoy compounded results.

The reason why this process works so well is because it prompts you to look freshly at your business every quarter while also allowing you and your team time to dive deep into the execution and actually accomplish meaningful progress on clearly prioritized Focus Areas of maximal importance to your

### Sample Quarterly Strategic Action Plan

Focus Area One:	Action Steps/Milestones	Who	By When
Lead Generation: Getting more people in the door!	<input type="checkbox"/> Lay out current system and tracking to see what historic performance reveals. Use insights in next action step to pick tactics to increase store visitors.	John	1/15/XX
Criteria of Success: » Have a baseline scorecard in place that tracks daily traffic through our stores. » Decide on the top 2 marketing ideas to implement for Q1 and implement them (with simple metrics to track results). Rough system laid out for each.	<input type="checkbox"/> Conduct "Sweet Spot" Analysis and choose the top 2 marketing ideas to implement in Q1. Rough out plan to implement and systematize each.	John	1/31/XX
	<input type="checkbox"/> Create a draft "Marketing Scorecard" to use to track daily key marketing numbers (and store sales by one breakdown).	John	1/31/XX
	<input type="checkbox"/> Checkpoint 1: How is KPI going? Review how implementation of 2 new tactics going. What is working well? What simple tweaks should we make?	John	2/28/XX
KPI: # of Qualified visitors to each store per day	<input type="checkbox"/> Review status at end of quarter and then refine next steps for Q2 based on where we stand.	John	3/21/XX
Focus Area Two:	Action Steps/Milestones	Who	By When
Begin to systematize the "sales associate customer service role of our business.	<input type="checkbox"/> Brainstorm all the "sales associate systems we think we'll eventually want for our sales associates, from hiring, to training, to doing the sales associate role on the showroom floor.	Sarah	1/15/XX

You'll use the 1-page Quarterly Strategic Action Plan (SAP) to focus your team to execute in a rolling series of 90-day sprints.



Dr. Challa, his wife Jaya, and Michelle Meier of Kansas Medical Clinic, a 10-office practice in the Midwest, with Maui coach Patty DeDominic. Michelle shared, "It's [the Maui quarter planning process] helped us manage tremendous growth and keep our various departments aligned."

business. Without this clear framework, too many leaders change their focus so often that their teams are left dizzy, feeling the vertigo of too much change, and frustrated because, just when they seemed to be on the verge of really getting something big done, the leader shifted the playing field yet again, forcing them to abandon projects prior to completion and wasting hours of their effort. The business leader who finds herself changing things on her team monthly (or even weekly!) may just be addicted to the adrenaline of change or the illusion that this enhances her control. Generally, stepping back once a quarter to determine your priorities and resource allocation is your best bet.

Done well, your quarterly ninety-day sprints will reward your business with the biggest benefits of regular opportunities to change and adapt as well as the results you get from the momentum of disciplined execution on known priorities quarter by quarter.

### The Secret Tool to Exceptional Execution – The Weekly Big Rock Report

If your action plan is built on the quarter, then the execution of your plan is built on the unit of the week.

Each week, review your quarterly 1-page SAP and pull out the key steps that you need to complete during the coming week. Considering that you really have only 5-15 hours of true focus time during most weeks, you need to be very clear at the start of the week what high-value activities you want to invest this precious focus time into for maximum results.

To help our business coaching clients operationalize their quarterly action plan and actually do this every week, we created a tool called the Big Rock Report. You've likely heard the descriptor Big Rocks before; it has become a common term in the business lexicon.

Our Big Rock Report turns this concept into an organized, structured tool that you can use to execute on your quarterly Action Plan in the face of all the urgencies and distractions in your typical work week.

Here's how it works: At the start of each week, you and your key staff members will review your quarterly SAP and each of you will pick two or three "Big Rocks". Big Rocks are specific action steps, tasks, or chunks of a key project that, if you did them in the coming week, would do the most to help you accomplish the key results outlined in your quarterly SAP. If you don't concretely identify your Big Rocks at the start of the week, odds are that any focus block you schedule instead will be wasted on lower-value junk.

Each Big Rock should be something that takes no more than two hours. If it's likely to take longer, then break it down into smaller chunks. Why two hours or less? Because, even following the time-mastery strategies we'll help you to master as part of the coaching program, it's unlikely that you'll consistently be able to block out a bigger chunk of time in your schedule. By limiting your Big Rocks to steps that you can complete in a one- to two-hour time frame, you'll increase your odds of getting them done.

The first part of your weekly Big Rock Report is to review how you did on your prior week's Big Rocks. Did you get them all done? What were the outcomes? What next steps are needed? What other information do you want to share with your team on these items?

The report then lists key victories, challenges, and other updates.

Finally, the Big Rock Report ends with you and your key team members reviewing your SAP to pick your two or three Big Rocks for the coming week. (See the example Big Rock Report on the next page.)

The Big Rock Report helps you escape the trap of a typical to-do list, with its overwhelming and unending supply of tasks and action steps you "have to" get done today, this week, this month, or this quarter. Stop and think for a moment about how a to-do list often is composed. It's a written or typed list of action items you own, usually with no real structure, other than as a catchall place flowing down the page and onto page two, three, four (gulp), five. It visually treats every item on that list equally, each just owning a row on the list.

Your Big Rock Report most decidedly is not a to-do list. It begins with you making the decision at the very start of your week what one, two, or three action items or Big Rocks you will choose that will make the biggest impact when you complete them this week. Of course, there may be times that you need to sidestep and handle an important and pressing problem or to seize a new and valuable opportunity not listed on your quarterly SAP.

Either way, you've pulled the most valuable, important action steps for the week off your to-do list where they were buried.

Here's one more thing the Big Rock Report does for you besides helping you better self-manage. When you get your key team members doing it too, the format lowers the burden of managing your key team. In one standardized format, you can see what they felt was most important to get done this week. You can see if they were accurate and optimal in their choice of priorities, and if not, the report prompts you to have a coaching conversation to better direct their attention onto the things that matter most. You have a clear accountability loop: did your team complete Big Rocks this week?

You'll soon come to love how the Big Rock Report gives you a fast and direct insight into your direct reports. Considering it takes you and your key team members only five to ten minutes each week to fill out, and it takes you only a few minutes to read several reports, this simple tool yields a big return.

Plus, people thrive and perform at their best when they can see the progress they are making. You can use the list of your team's victories as a reminder to help them celebrate, or at the very least, acknowledge, the progress they are making. And the challenges they list become a place for you to see how you can help remove obstacles and coach them to grow.

# Sample Weekly Big Rock Report

## Last Week's Big Rocks

Period Ending January 21, 20xx

	Big Rocks	Comments
<input checked="" type="checkbox"/>	* Formal debrief of Sand Hill project.	* Biggest insight was that because we agreed to include the two on-sites as part of the implementation contract, the client was thrilled. * We have already generated two strong referrals. (I'm following up on them now.) * I have also scheduled a 90-day follow-up with the client to make sure they stay happy and to ask for the next round of referrals.
<input checked="" type="checkbox"/>	* Follow up and schedule assesment presentation with Core Inc.	* Scheduled for February 7th. * Already in contact with Lee from Engineering to get his help on technical portion.
<input checked="" type="checkbox"/>	* Make 20 outbound stage one prospecting calls.	* Made 23 outbound calls; 3 stage two appointments set; 2 "timing issue" prospects to follow up with next month.

## Business Review

### Key Victories

- \* Sand Hill project client thrilled. Gave us 2 strong referral prospects.
- \* Was able to set assesment presentation with Core Inc. for Feb 7th.
- \* Tanya made an incredible save with Mirror Tech to bring them back to negotiating table. Way to go, Tanya!

### Key Business Challenges

- \* Trying to match up travel schedules with Engineering to accompany me on Core Inc. presentation. They are feeling very full. Working on it, but any help would be appreciated.

### Key Updates

- \* New pre-call direct mail package made a real difference for my stage one prospecting calls. Three of the prospects I talked with specifically commented on the quality/value of the package.
- \* Tried out Paula (new sales admin) on scheduling stage one calls for me. Didn't work well. Will try a different scripted opening next week to see if that helps.
- \* Reminder that Tech World conference is 3 months away. We need to get trade show team together sometime in the next 2 weeks to get organized.

## Next Week's Big Rocks

1. Global Finance Inc. presentation on 19th.
2. Make 20 outbound stage one prospecting calls.

The weekly Big Rock Report on the Maui coaching app helps clients pull the most important tasks from their quarterly action plan on to their weekly action list. Executing weekly is where you earn your business results.