

Create Your *Quarterly 1-Page Action Plan*

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:	Q1			Q2			Q3			Q4			Annual		
	Target	Actual	Δ %	Target	Actual	Δ %	Target	Actual	Δ %	Target	Actual	Δ %	Target	Actual	Δ %
Gross Sales (\$)	\$3 million	\$3.2 million	6.7%	\$2.5 million	\$1.75 million	-30%	\$15 million	\$1.05 million	-93%	\$3 million	\$2.1 million	-30%	\$10 million	\$7 million	-30%
Gross Profit (\$)	\$2.1 million	\$2.5 million	19%	\$1.75 million	\$1.05 million	-40%	\$1.05 million	\$1.05 million	0%	\$2.1 million	\$1.05 million	-50%	\$7 million	\$5 million	-29%
OPM (%)	70%	78.1%	11.6%	70%	60%	-14%	70%	60%	-14%	70%	60%	-14%	70%	60%	-14%
Operating Profit (\$)	\$400K	\$78K	-80%	\$500K	\$500K	0%	\$300K	\$300K	0%	\$600K	\$600K	0%	\$2 million	\$2 million	0%
OPM (%)	20%	24%	20%	20%	20%	0%	20%	20%	0%	20%	20%	0%	20%	20%	0%
Key Performance Indicators															
KPI #1 Leads/month	4,000/month	4,050/month	1.2%	\$2.5 million	1,500/month	-40%	4,000/month	4,000/month	0%	3,000/month	3,000/month	0%	3,000/month	3,000/month	0%
KPI #2 Client Retention	20%	20%	0%	\$1.75 million	20%	0%	20%	20%	0%	20%	20%	0%	20%	20%	0%
KPI #3 Revenue Score	50 months	50 months	0%	50 months	50 months	0%	50 months	50 months	0%	50 months	50 months	0%	50 months	50 months	0%
KPI #4 Cost / Sale	\$15/cust	\$16,500	10%	\$500K	\$15/cust	0%	\$15/cust	\$15/cust	0%	\$15/cust	\$15/cust	0%	\$15/cust	\$15/cust	0%
KPI #5 Avg. Unit of Sale	\$75/cust	\$75/cust	0%	\$85/cust	\$85/cust	0%	\$85/cust	\$85/cust	0%	\$85/cust	\$85/cust	0%	\$85/cust	\$85/cust	0%
Capacity to Develop															
Learning to use our new CRM to increase efficiencies.															
Continue learning to best use CRM to increase efficiencies.															
Strategic Depth Step to Take															
Grow team 2 people (Tim and Sheila) on Production Scheduling System.															
Hire and onboard second billing team member to work with Chris.															
Meas to Clean Up															
Attitude issue with Eric's field crew.															
Right size contract premiums with Shelton. Too much scope creep last 6 months.															
Top Victory to Celebrate															
5 of 6 sales team members crushed their sales numbers															
Key Lesson to Build On															
In future, up 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 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. KPI: # of Qualified visitors to each store per day	<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
	<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 leaders who find themselves changing things on their team monthly (or even weekly!) may just be addicted to the adrenaline of change or the illusion that this enhances their 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.

Quarterly Action Plan for: _____

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