Vision Builders Workbook

A STEP-BY-STEP WORKBOOK FOR CREATING A COMPELLING AND SHARED VISION

By Mark Abbott and Tommy Mains | May 2023 | Ninety

A Message from the CEO

Every organization runs on some kind of system. As a business grows and evolves into a company, and a company evolves into a great company, so should its operating system.

At Ninety, we understand the challenges of building, running, and scaling organizations. Our mission is to make that work easier by providing a cloud-based platform with the essential concepts, tools, and disciplines leaders need to upgrade their operating systems.

We believe we're moving into a new age of work — the Age of Understanding, or Work 8.0. The coming of this age was inevitable, but the pandemic accelerated its arrival by about ten years as so many organizations transitioned to remote or hybrid models.

With access to a wider array of opportunities than ever before, people don't just want to punch a time clock anymore — they want to find value and purpose in their lives through Work they love doing (which we refer to as Work with a capital W).

This guide is all about how to master a particular concept, tool, or discipline needed to build a great company in this new age of Work. Great organizations know who they are, what they are, where they are, where they want to go, and what it's going to take to get there.

Our relentless focus is to simplify the hard work of aligning and focusing teams so organizations and their employees can thrive. We're glad you're joining us on this journey. If you have questions or want to learn more, reach out to helpful@ninety.io — we'd love to hear from you.

Gratefully,

Mark Abbott

CEO + Founder, Ninety.io

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About 90os

Ninety guides are a growing collection of topic-specific, best-practice tutorials regarding the essential concepts, tools, and disciplines used by great company builders.

These guides have been created by a collection of company builders and leadership team coaches who have successfully built their own companies, invested in a hundred more, sat on dozens of boards, and coached hundreds of leadership teams.

Our coaches and education team have synthesized their vast experiences into meticulously-curated guides, briefs, assessments, and articles to help small and midsize organizations focus, align, and thrive.

While our content will continue to evolve as our collective understanding grows, our relentless priority will always be to help leaders build extraordinarily productive, humane, and resilient organizations where people are focused, aligned, and thriving. We hope you find value in our learning, support, and technology platform.

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We designed this workbook to help leaders create a compelling Vision with an actionable plan that their entire organization can embrace. An organization's Vision is its definition of itself and the expression of its highest aspirations. We'll outline how to craft long-term goals, define Core Values, identify your Ideal Customer, and much more.

• **Part One** provides context around why Vision is so important and lays out the choices you'll need to build your Vision.

• **Part Two** is a step-by-step workbook that provides a deep dive into each of the Focus Filters associated with a clear, simple, and compelling Vision. There are also questions to help express your Vision and recommendations for crafting compelling language that captures the hearts and minds of your colleagues.

• **Part Three** consists of recommendations for how to roll out your Vision to the entire organization.

• The **Appendix** details additional resources to help you build a compelling Vision.

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LET'S DIVE IN.

WORK IT — This is a workbook, which means it was designed for you to brainstorm, scribble, highlight, and annotate. Your input is vital.

SAVE IT — Continue to use this workbook as a high-value reference, highlighting what's most useful. We've left space for note-taking on most pages.

SHARE IT — The information and advice on these pages are intended to be shared with others. We deeply believe that useful information should be accessible to all.

Table of Contents

> **"IF YOU FOLLOW SOMEONE ELSE'S WAY, YOU ARE NOT GOING TO REALIZE YOUR POTENTIAL."**
>
> **JOSEPH CAMPBELL**
> *THE HERO'S JOURNEY*

At Ninety, we've seen plenty of companies progress through the Stages of Development and make that all-important leap from good to great. In fact, we've helped many of them get there. Since we're also walking that path, we know how difficult it can be. It requires focus, fortitude, persistence, humility, and a good dose of opportunity now and again.

Here's what we've learned along the way:

Every one of us — and every one of our stakeholders — is undertaking a hero's journey. Many of these journeys are interdependent. Part of our journey involves you, and part of your journey involves us.

So what's the origin story of this journey we're about to take? While the concept dates back thousands of years, the hero's journey gained renewed attention and a place in the modern lexicon with Joseph Campbell's 1949 book, *The Hero with a Thousand Faces*. In his influential work, Campbell explored a familiar motif across generations and cultures: a seemingly ordinary person reluctantly embarks on an adventure, faces (and ultimately prevails over) a crisis, and returns home transformed.

Entrepreneurs and visionaries who seek to build an enduring company have all chosen, consciously or not, to embark on a hero's journey.

We created this Vision Builders Workbook to help you envision, plan, and execute your hero's journey. The workbook represents the core concepts and disciplines we believe a leader needs to craft a compelling Vision for any business. It will help crystallize your thoughts and purpose, shake aside doubts, and move you away from what is known and comfortable to confidently take those first steps toward a new and enriching adventure.

There are many examples of a visionary's hero's journey from businesses large and small. One of our favorite stories is about Krittika (Krit) Khandelwal. Krit's pasion for sustainable products sparked the idea of turning coconut shells into jewelry, but the idea proved more challenging to scale than she imagined. Unshaken in her determination to create a product that empowered local artisans and made life better, her journey led her to create Soothi, a brand of sustainable journals and stationery. Soothi donates portions of each purchase to worthwhile organizations that help make the world a better place.

We understand that some journeys are more daunting than others. And we recognize that the many tests faced along the way may derail you. One chief culprit is the often limitless and distracting stream of ideas (commonly referred to as shiny objects) a visionary generates every day. These shiny objects can manifest as a new industry, an entirely unrelated product, or a new customer type.

The temptation to succumb to fear and greed is another kind of test. For example, consider the implications of overreacting to missing a quarterly sales target or rolling out ruinous pricing tactics to undercut a competitor, only to be forced into extreme internal cost-cutting measures.

Here's why chasing every idea, or buckling to fear and greed, is problematic:

- It distracts us from our true purpose and passion.

- It stretches or diverts our resources.

- It slows down the gains made from compounded efforts.

- It frustrates team members who are asked to change course.

- It hurts morale as people sense the company's loss of direction.

Sure, no journey is perfect. But imagine what happens when team members no longer feel they're moving toward the Just Cause that compelled them to join you on the hero's journey — they may feel deceived and lose hope in the overall Vision.

This is why we strongly believe in adhering to Focus Filters, the essential elements of an organization's Vision through which every decision the company makes must pass. These include your Core Values, Ideal Customers (the people you intend to serve), Unique Value Proposition (the value you aim to provide them), and business goals.

> ## Focus Filters keep an organization fixed on its primary goals.

Our Vision Builders Workbook provides a collection of concepts, tools, and disciplines like the ones mentioned above to help those embarking on the hero's journey stay the course.

Remember, the journey of creating a clear and compelling Vision is a process, not an event. It may be best to think of the return from each journey as a rewarding respite before taking the necessary steps toward the next adventure.

Our Vision Builders Workbook is here to guide you and your colleagues every step of the way.

Part One:
The Big Picture

At Ninety, we understand that when people start or take over an organization, developing a Vision might be low on the priority list. We often hear entrepreneurs ask, "How can we afford to set aside time to reflect on our future when we're overwhelmed with emails and calls?"

The fact is, making time to work on how your business operates is the best way to build the company you've always wanted. We live and breathe the entrepreneurial life and want to share what we've learned to help you and your company focus, align, and thrive.

Similar to our own growth and maturation, businesses go through Stages of Development (Figure 1.1). When starting out, entrepreneurs focus on getting a product or service out the door, building processes, and growing their customer base. Once a business establishes a good foundation, it can begin the work of becoming a company that can endure and be passed on to future leaders. Developing the company's Vision is vital to this process because it acts as a standard to filter decisions through, develop goals, and motivate team members.

We get that beginning this work might feel overwhelming. It might push you and your colleagues outside of your comfort zones. But doing this important work will help you build something that will endure. Rest assured that developing a compelling Vision is achievable, and we'll be here with you every step of the way.
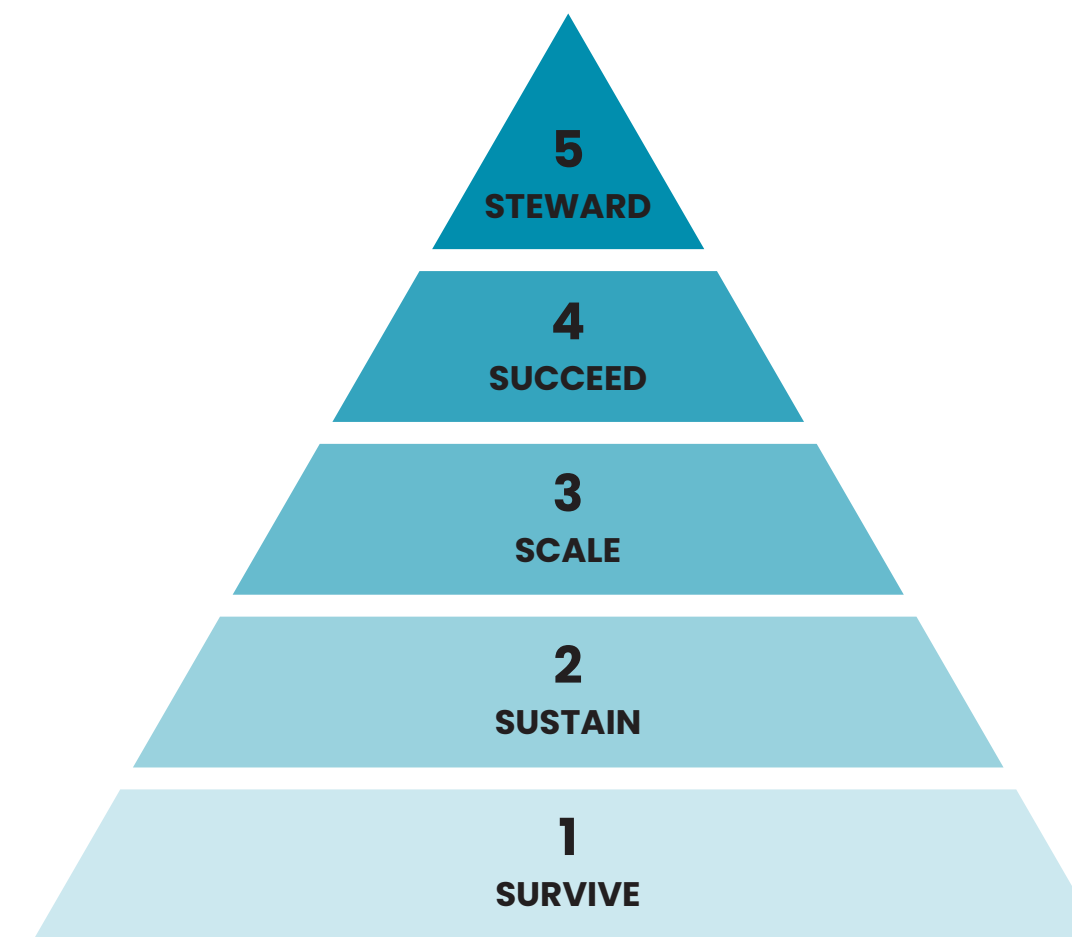

Figure 1.1 The five Stages of Development organizations go through to become a great company.

There are three primary ways to approach creating a Vision:

1. The visionary works alone.

2. The visionary works with their Senior Leadership Team (SLT).

3. The entire SLT works with a business coach.

Whoever is involved, we recommend getting away from the office to minimize distractions. This work requires dedicated time and concentrated focus without phone calls, emails, or other interruptions.

Think of it like going to the mountains for a retreat — even if you complete this workbook in a coffee shop or a rented house. Go to the mountains (literally or figuratively) to formalize a Vision, return and make sure you and your SLT are 100% aligned, and then share it with your organization.

RECORD DISCUSSION TOPICS AND TO-DOS

As you progress through the workbook, you may think of ideas, Issues, or To-Dos that you want to capture in the moment. Use the following areas of the Appendix to document your thoughts as they occur:

- **Long-Term Issues List** (Page 77) — Items to be discussed at your team's next quarterly meeting.

- **Short-Term Issues List** (Page 79) — Items to be discussed at your team's next weekly meeting.

- **To-Dos List** (Page 81) — Specific tasks to complete by a specific date (often within the next seven days).
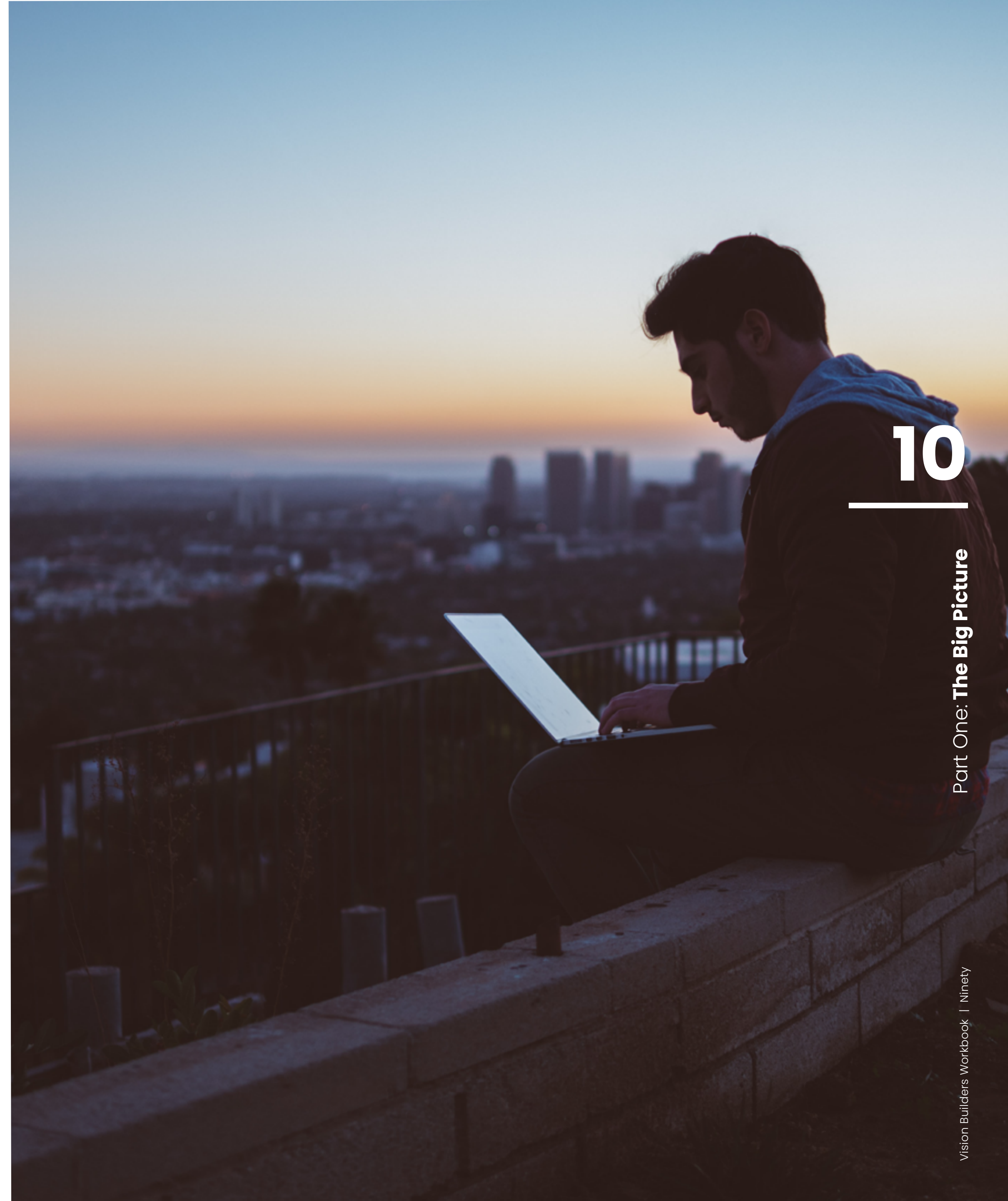
One More Thing Before We Begin

As you begin establishing the Focus Filters that you'll eventually use to align your organization, you can take a few different paths to document your thoughts.

1. **Print this document and write in your responses.** If you need to avoid distractions, this may be your path. Utilize the power of writing by hand and gain a souvenir of your journey.

2. **Download this workbook to fill out on your computer or tablet.** Be sure to use a PDF-viewing application such as Adobe — this way, you can save your progress as needed, and any links you access will open up in a separate web browser.

3. **Sign up for Ninety and add your answers to the Vision tool**. We're here to help. After your free trial, contact our Client Success team for a Vision Builders 90 Days code for 20% off your subscription for three months.

As you progress through the workbook, we hope you'll see the power of our platform and join the thousands of visionaries running their organizations on Ninety. But first things first — let's help you get your Vision down, shared, agreed to, and on its way to becoming a reality.

The Four Types of Organizational Leaders

In August 2014, the marketing company Infusionsoft asked over 800 small business owners questions about their feelings, attitudes, challenges, and goals. Their findings showed four distinct types of entrepreneurs:

PASSIONATE CREATORS
Individuals who start or take over a business that will provide a totally new or highly differentiated product or service that they believe the world needs now or will need soon.

LEGACY BUILDERS
Individuals or partners who start or take over a company in an established industry and believe they can bring something new that no one else offers.

FREEDOM SEEKERS
Individuals who start or take over a business because they value independence and flexibility. They want the ability to control their schedule, career path, and environment.

STRUGGLING SURVIVORS
Individuals who work for themselves or take over a business simply to generate a decent quality of life for themselves and their families.

Ninety's founder Mark Abbott — who's invested in over 100 private companies, sat on dozens of boards, and coached over 100 entrepreneurs over the course of his life — has seen these four archetypes in action. Each is a leader who needs to develop a clear and compelling Vision if they want to build a focused, aligned, and thriving organization.

Which of the four types of entrepreneurs best describes you — and why?

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> **We don't make money because we want to make money; we make money because someone values what we do.**

Output-focused visionaries often spend time focusing on the wrong things.

Discipline and inputs, not outputs, drive value creation and provide the benefit of compounding value. Your long-term outputs, like profit, are a direct result of disciplines and inputs, like goal-setting practices, culture, and structure.

Exclusively seeking a specific output, like happiness or pure profit, is a mistake. Research published in 2015 by Brett Q. Ford, et al., in the *Journal of Experimental Psychology* explored the effects of being motivated to pursue happiness. Ford's team asked people to rate themselves on such maxims as "Feeling happy is extremely important to me" and "How happy I am at any given moment says a lot about how worthwhile my life is."

Ironically, people who highly agreed with such statements were less likely to receive favorable outcomes and were more likely to be depressed and lonely. They focused on the output (feeling happy) rather than the input (the activities, people, and moments that lead to happy feelings).

We see a similar pattern in business leaders: when visionaries are too focused on profit output, they're likely to stunt the business's long-term growth.

Focusing too much on output variables like revenue and profit is like driving forward while looking in the rearview mirror. Leading indicators (typically inputs) and lagging indicators (outputs) are worthwhile measurables to monitor. However, to prepare for the long haul, prioritize sustainable, future-focused metrics.

We coach our clients to establish a Vision consisting of a short and specific collection of Focus Filters to help guide and inform everyone's decisions in the organization. Then, they and their colleagues can focus on scaling the company with clarity, purpose, and consistency. When we focus on disciplines and inputs, we dramatically enhance our ability to turn our Vision into reality.

To illustrate our point, we teach a concept called **Scalers versus Scalars** (Figure 1.2).

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Scalers are visionaries who have a crystal-clear understanding of:

• Who the company is and what it does

• How it makes the world a better place

• Why it matters

• Where it's going

• The pace it wants to run

• What it wants its culture to be

• What it needs to do to get from here to there

We refer to leaders who have a clear Vision and are committed to using Focus Filters as a specific set of core disciplines or guiding principles as **visionaries** or **visionary leaders**.

Focus Filters help ensure that everyone in the organization is aligned on the things that really matter. We recommend that these things include the company's Industry and Niche, Ideal Customer, Unique Value Proposition, Purpose/Passion/Just Cause, Core Values, and, of course, Goals.

We contrast Scalers with what we call *Scalars*. Scalar is a term in physics for a quantity with a magnitude but no direction (like mass as opposed to force). Scalars tend to lack focus, making them susceptible to being swayed by various external factors such as customers, friends, team members, vendors, investors, or the latest fads.

Scalars are scattered. Scalers know what matters to them. This clarity simplifies building momentum toward their goals since each of their decisions passes through a clear set of Focus Filters aligned with those same goals.
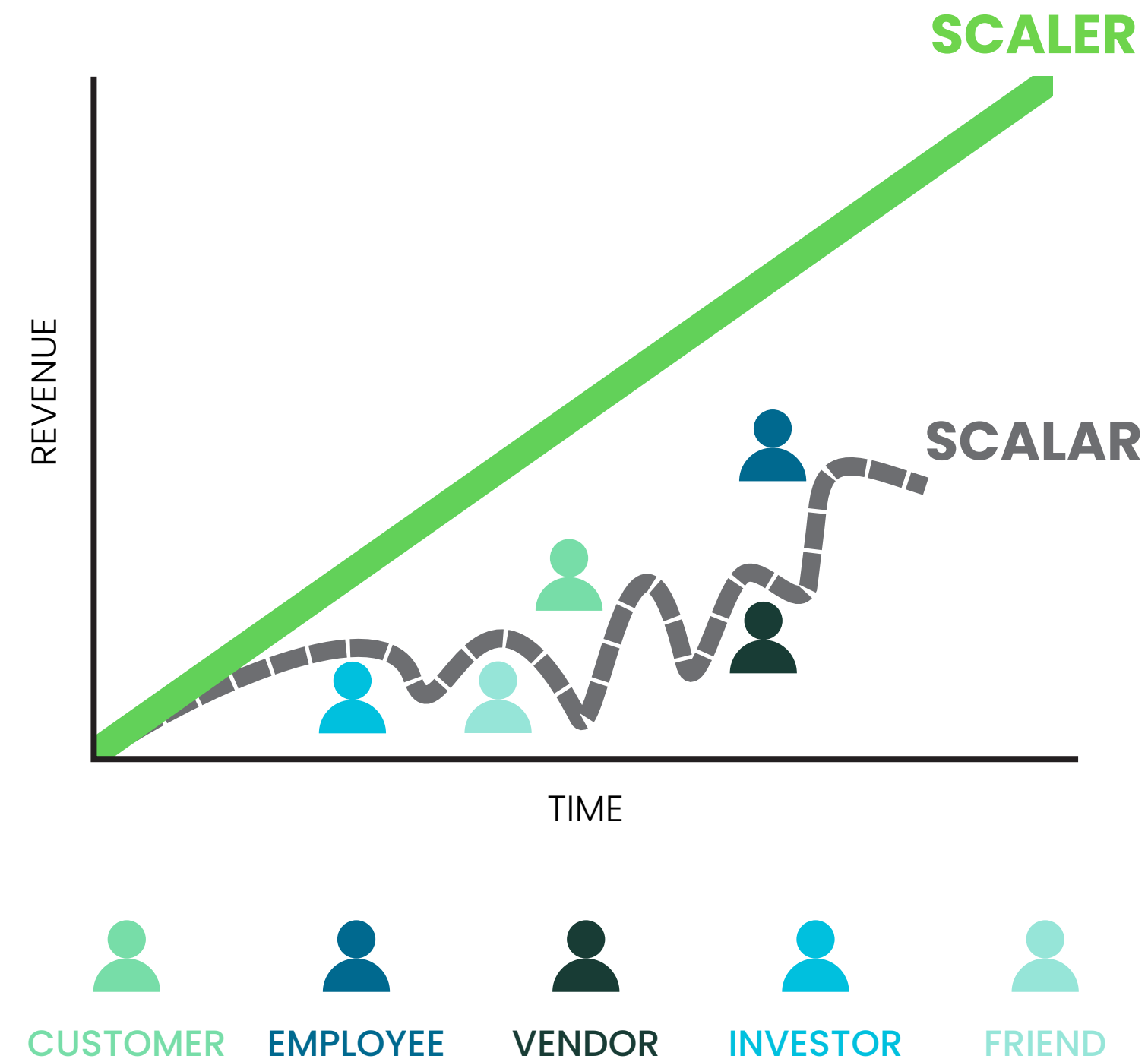

Figure 1.2 *Scalers* focus on long-term goals and aligning the organization. *Scalars* are often distracted, leading to less growth over time.

Our favorite example of a team reaching success through Focus Filters comes from Dr. Benjamin Hardy's essay "This One Question Will Make Every Decision In Your Life Easier." Dr. Hardy explains how a singular filter can be extraordinarily effective. To make his case, he starts the piece with a story about Britain's 2000 Olympic rowing team. The British team hadn't won a gold medal since 1912, but right before the 2000 Olympics, they embraced one filter:

"Will it make the boat go faster?"

They used this filter not just once or twice, but *every single time* they faced a decision.

Should I eat this donut?	→	Will it make the boat go faster?
Should I stay up late with friends?	→	Will it make the boat go faster?
Should I play some pickup basketball?	→	Will it make the boat go faster?

Filters force us to acknowledge that to have something we really want,
we must be willing to pay the price — including the sacrifice of other opportunities.
In short, we can have anything we want, but we can't have everything we really might like to have.

The British rowing team was willing and committed to paying the price, and they won that gold medal. They said "No" to many things they wanted in order to make their boat go faster — they embraced the price.

Building Your Focus Filters

▼ Several of our senior executives are leadership team coaches. Here are a few of the core questions they always ask their clients. Try your hand at answering them as best you can. As you answer, consider the impact of your Focus Filters on your Ideal Stakeholders.

1. **What do you really want?**

2. **Do you know what the price is?**

3. **Are you willing to pay that price?**

4. **Are you willing to embrace a simple set of Focus Filters to guide every decision the company makes?**

Building Your Focus Filters continued

The nice thing about focusing on what we truly want is that it forces us to think about the big picture. Entrepreneurial coach Dan Sullivan teaches a concept called *10x thinking* which encourages a change in mindset to plan on achieving ten times your current results. Having a 10x goal is powerful, and research shows that long-term goals are more impactful than short-term goals because they're big enough to motivate an entire organization. To build to those long-term goals, use Focus FIlters to keep you on the right track.

In short, if we genuinely want something, we're wise to embrace a set of Focus Filters that are clear and compelling. Filters make it possible to determine what everyone in our company should say *Yes* to and when they should say *No*. When you and your team are collectively willing to say *No* to everything that doesn't make it through your Focus Filters, we're confident you'll be on the path to building an extraordinarily focused, aligned, and thriving organization.

What will make your boat go faster?

A strong Vision can also make work more meaningful for team members, transforming a job from tasks you pay a team member to complete into something they love doing. That's what we call Work with a capital W. You can read more about Work on our CEO's blog, abbott.work.

When our team members understand where the company is going and can see how their work helps the company get there, they feel that their work is more valued. And they feel good about contributing to something larger than themselves — not just the bottom line.

When you have strong, clear, and compelling Focus Filters, everyone in the company has a set of guiding principles that simplifies making wise decisions and allows companies to Get Smart Stuff Done (GSSD).

GETTING SMART STUFF DONE

Speed and productivity are important, but finding the quickest way to do something is not always the best for stakeholders over the long term. That's why one of our Core Values at Ninety is to Get Smart Stuff Done (GSSD). This maxim broadens our focus from moving quickly to being mindful of each decision, and any associated knock-on effects, so we make the wisest choices for the organization over the long run.

**"AVERAGE PLAYERS
WANT TO BE LEFT ALONE.**

**GOOD PLAYERS
WANT TO BE COACHED.**

**GREAT PLAYERS
WANT TO KNOW THE TRUTH."**

DOC RIVERS

We refer to this quote a lot around Ninety. In our experience, Scalers are also truth seekers. That makes data every Scaler's best friend.

One of the tools we encourage all our clients to use is the Ninety Baseline Assessment — a 32-question survey that provides a score for each of the 9 Core Competencies needed to build an extraordinarily focused, aligned, and thriving organization. The 9 Core Competencies are Vision, Customer, Goals, People, Structure, Data, Meetings, Process, and Enterprise Value.

As coaches, we endeavor to get our clients to 90% strong across each of the 9 Core Competencies. The next page includes the survey's Vision Competency questions. We encourage you to answer them honestly to determine the current strength of your Vision.

Note: If you haven't embraced a Business Operating System (BOS) like 90os, you'll likely score less than 50%. Don't worry, this is normal. We're passionate about helping you get to 90% strong or higher across the 9 Core Competencies. That's why we create resources like this.

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THE VISION ASSESSMENT

For each statement below, rate your organization on a scale of 0 to 5. Then, follow the Total Value formula to find your competency score.

	0 = Bad	1 = Missing	2 = Weak	3 = Neutral	4 = Good	5 = Great	**Score**
1	We have identified our **Ideal Customer**, and over 90% of our customers are Ideal.	
2	Our **Unique Value Proposition** (UVP) deeply resonates with our Ideal Customer, and our sales and marketing efforts clearly communicate our UVP.	
3	Our **Core Values** are clear, and we consistently use them to hire, review, and reward team members, as well as to address cultural fit issues.	
4	Over 90% of our team members believe that we're truly **making the world a better place**.	
5	Our **Compelling and Audacious Goals** (CAGs) are clear and shared by over 90% of our team members.	
6	We have **clear and compelling 3-Year, 1-Year, and 90-Day Goals** (Rocks) in writing, and they're shared by the vast majority of our team members.	
7	We have a **Customer Journey** that resonates with our Ideal Customer and has been named and illustrated. Our people, systems, and processes are aligned with it.	
	Sum Total	
Total Value: After adding up your scores, divide the sum total by 35 (Sum Total ÷ 35).	

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Explore our 90u Glossary

A Business Operating System (BOS) consists of the key **concepts, tools, and disciplines (CTDs)** an organization uses to focus, align, and ensure that the right work gets done when and how it was intended. While every company uses a BOS, some are more intentional than others. The best-designed BOSs offer the essential time-tested CTDs an organization needs to turn its Vision into reality.

These CTDs help organizations set goals, solve problems, make thoughtful choices, take action, create a thriving culture, monitor progress, and much more. A universally applied BOS simplifies the hard work of building a great company.

We've identified five levels of Business Operating Systems (Figure 1.3):

- **Accidental** — Improvised, reactive, and disorganized. Most organizations start here, with leaders and team members following their own practices.

- **Intentional** — Stable, purposeful, and experienced. After gaining customers and team members, leadership agrees on simple tools and disciplines drawn from their personal or collective experiences.

- **Designed** — Expert-led, industry-specific, and calculated. To scale with the organization's growth, leadership adopts an expert-created BOS that includes interrelated concepts, tools, and disciplines that work best when used together.

- **Holistic** — Proven, time-tested, and enduring. With support for every main business function, Holistic BOSs have all the major concepts, tools, and disciplines associated with building an enduring company.

- **Integrated** — Cloud-based, actualized, and unified. Seamlessly includes data with cross-organizational views of metrics, goals, responsibilities, and more. This cloud-based BOS platform contains all the core concepts, tools, and disciplines needed to make the founder's Vision a reality.
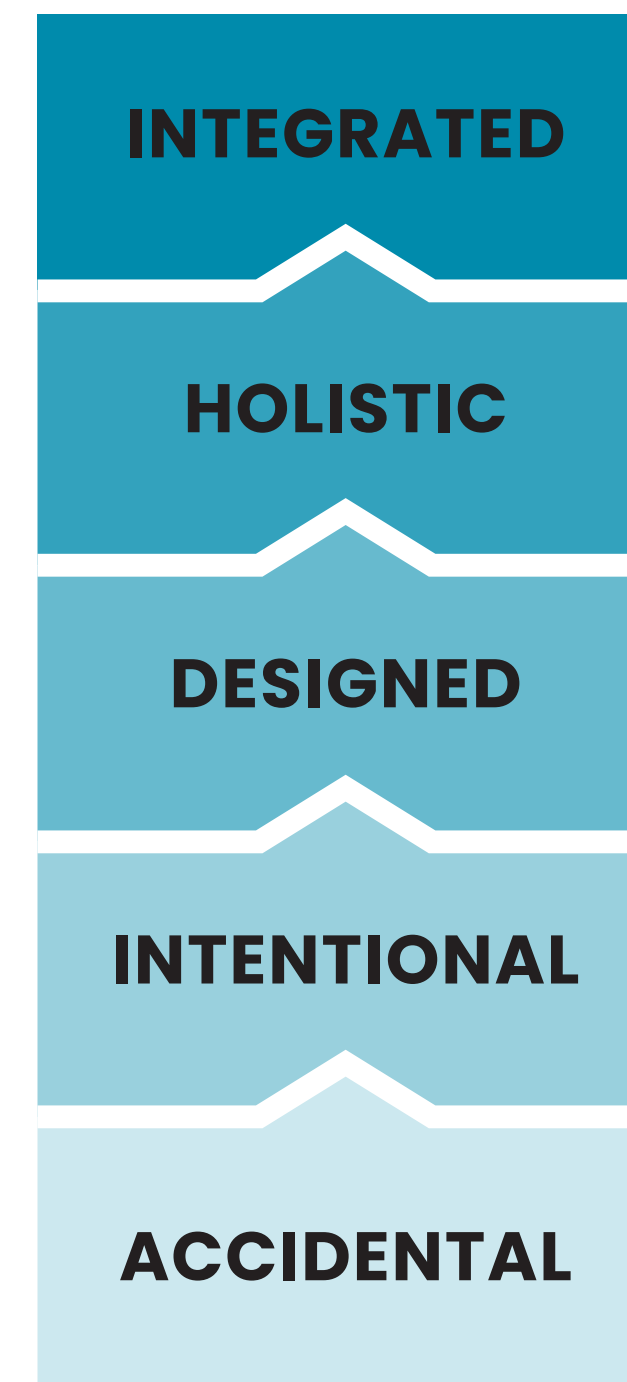
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Figure 1.3 The five levels of Business Operating Systems.

On Business Operating Systems

Stage 1
SURVIVE
- Typically, a newly established business
- Primary focus: keep the lights on

Stage 2
SUSTAIN
- A business with some success in its market
- Primary focus: do what's worked and endure

Stage 3
SCALE
- A business with enough market success to attract investors
- Increasingly adds expertise
- Primary focus: prepare a path for long-term viability

Stage 4
SUCCEED
- A business with enough proven infrastructure to no longer be founder-dependent
- Organized and mostly expert
- Primary focus: continued growth

Stage 5
STEWARD
- A business with proven success, integrated data, and alignment to its Vision
- Wisely builds for the future
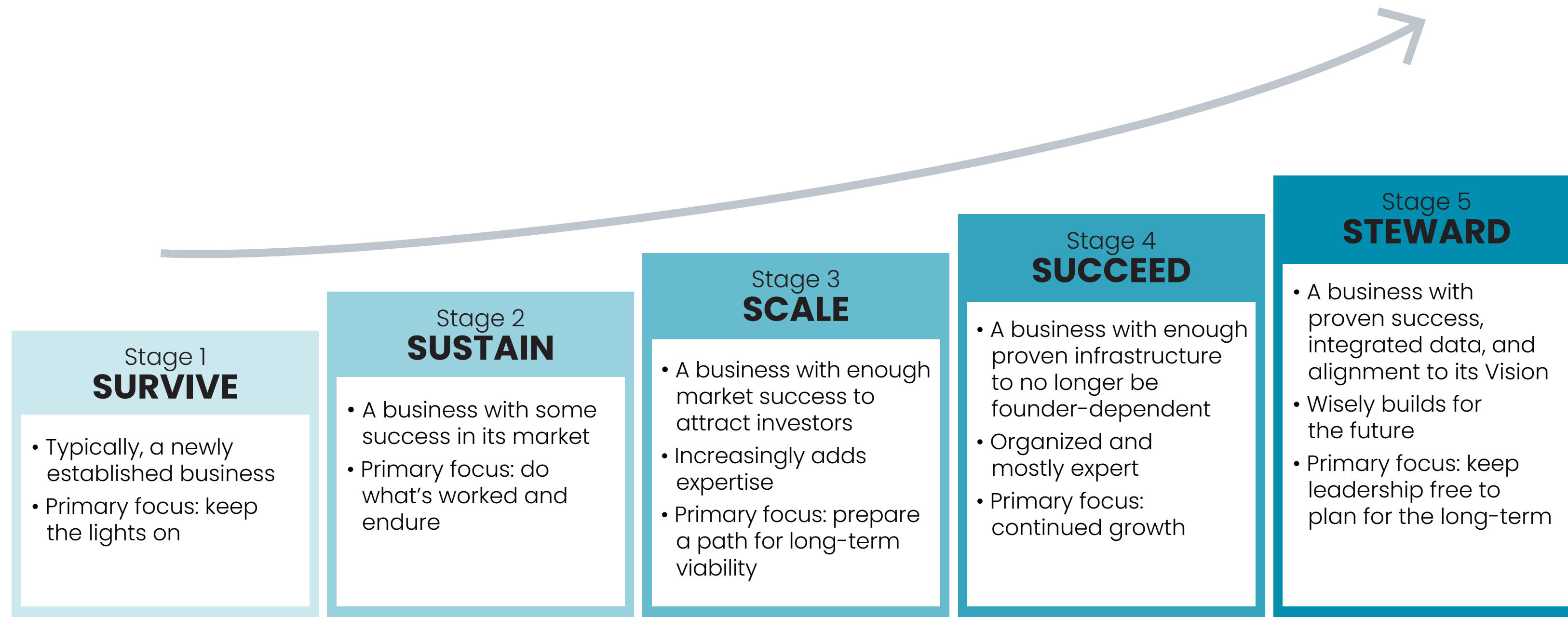- Primary focus: keep leadership free to plan for the long-term

Figure 1.4 Another look at the five Stages of Development.

Early-stage systems come with significant problems that inhibit growth. They've been reactively designed, are often overly complicated, have redundant or ineffective processes, and aren't producing the necessary results. These systems may have worked fine initially but have proven unsustainable.

As an organization progresses through the Stages of Development (Figure 1.4), it's crucial to understand what kind of BOS is most appropriate — and when it should evolve.

With growth, it's essential to adopt a higher-tier BOS that can effectively manage the increased complexity and scale of operations. To upgrade BOSs, leadership needs to invest about 10% of their time, energy, and effort into analyzing *how* the organization operates — we call this working ON the business.

Implementing a new BOS can be daunting — you may need to relinquish old habits, retire tools, and change processes in favor of the CTDs offered by the BOS. Change can bring on an emotional tax, so total commitment for a BOS evolution is critical. Organizations can achieve their full potential and become great companies by taking the plunge and implementing a higher-tier BOS.

Before moving to Part Two, you have a big decision — will you continue this journey alone, with your Senior Leadership Team, or with a coach? Documenting your Vision and upgrading your Business Operating System takes commitment, but doing so will simplify the hard work of building a great company.

If you'd like a coach, contact us at helpful@ninety.io, and we'd be happy to learn more about you and provide three highly qualified referrals.

Regardless of which path you choose, remember the adage: "If people don't weigh in, they can't buy in." The fact is, leaders have followers. If no one is following you, you're not leading.

One of the goals of this exercise is to create and commit to a Vision. A Vision you share with each of the new hire candidates you're seriously considering. A Vision others will follow. A Vision so deeply ingrained in your being that you're totally at peace with letting go of the habits, people, and processes that don't align with or want to help you pursue it.

If you want to see our Vision, check it out on our About Us page at www.ninety.io.

Part Two:
Determining Your Company's Focus Filters

Now that you've grasped the power of Focus Filters, Part 2 provides detailed instructions to create each Focus Filter for your Vision. Each section has questions to fill out so you can capture your thoughts as you progress through the workbook.

Overview

1. CLARIFY YOUR INDUSTRY AND NICHE

This foundational step is necessary when setting your Vision's scope. With the range in place, you can limit which opportunities you pursue and those you let pass by. A clearly defined **Industry and Niche** helps everyone understand and explain what the company does.

2. IDENTIFY YOUR IDEAL CUSTOMER

How do you make life better? How do you intend to matter? Like it or not, you don't make money because you want to — you make money because someone values what you do. Consequently, one of the critical questions you need to answer is, "Who is your customer?" Better yet, "Who is your Ideal Customer?" Until you're 100% clear on who you want to serve and why, everything else will be ambiguous, undefined, and vague — not just for you but for everyone in the company.

3. DEFINE YOUR UNIQUE VALUE PROPOSITION

Once you're clear on who your Ideal Customer is, you need to decide what they're buying from you — not just a product or service (*your What*) — but the thing you do to make that product or service compelling to them. This is your Unique Value Proposition (*your How*). It's a promise that all your team members must learn to appreciate and understand.

4. THINK ABOUT YOUR IDEAL TEAM MEMBERS

Now that you understand your Ideal Customer and how you'll serve them, we recommend becoming crystal clear about the type of people you want serving your Ideal Customers. What are the behaviors that your **Ideal Team Members** should embody?

We recommend developing a list of three to seven behaviors that are core to who you are and who you want to hire — these are your **Core Values.**

5. OUTLINE YOUR WHY AND YOUR COMPELLING, AUDACIOUS GOALS

Next, you should consider what you need to attract and retain top talent — your employee magnets. Now more than ever, team members have nearly endless employment opportunities. **What makes you an employer of choice?**

Research suggests companies need to articulate two things to attract Ideal Team Members:

- An influential Purpose/Passion/Just Cause

- Expansive Compelling and Audacious Goals (CAGs)

6. SET YOUR GOALS

While the big picture elements of your Vision are essential for attracting and retaining the right talent, we must bring it closer to reality by developing clear, compelling, and realistic sets of **3-Year, 1-Year,** and **90-Day Goals (Rocks)**.

7. DETAIL OTHER PARTS OF YOUR VISION

As you go through the exercises in Part Two, you'll come up with other thoughts that don't fit into the categories we just summarized. There are five places you want to write these down. To keep you organized, we've created an Appendix for these areas (Page 75).

- **Long-Term Issues List.** If you're like most Visionaries, you'll have lots of ideas for products, services, marketing, operations, and customer service that you won't be able to tackle this quarter. Use this list to house these Issues until the initial Vision and Goal Setting Sessions or your next Quarterly or Annual Planning Meeting.

- **Short-Term Issues List.** This list contains all the Issues to discuss immediately with your colleagues during the next weekly meeting. Regular Weekly Team Meetings are fundamental to Getting Smart Stuff Done.

- **To-Dos**. You'll likely have many ideas to take action on. Turn all activities beyond daily roles and responsibilities into To-Dos — a process easily handled on the Ninety platform.

- **SMaC.** Many entrepreneurs have some guiding principles that go beyond our Focus Filters. To organize these ideas, we created a section in our Vision tool called the SMaC (Specific, Methodical, and Consistent), which is a place for recording other guiding and enduring principles that you believe will help your organization focus, align, and thrive.

- **SWOT.** Throughout this exercise, you'll likely consider what's working in your company and what's not. We like using a simple SWOT analysis for recording thoughts on Strengths, Weaknesses, Opportunities, and Threats.

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This is your company. This is your journey. All we can do is help you get what you want. Remember, many visionaries get a coach to help them and their Senior Leadership Team become great company builders.

We created this workbook to help you think through your Vision and write down your thoughts. Once you're done, we invite you to document your Vision in the Ninety platform. There, you'll find a cloud-based platform for recording all your answers and everything you need to accelerate turning your Vision into reality.

Industry and Niche

You'd be surprised how many organizations need clarification on their industry and what they do or provide.

What do you think team members say if the Senior Leadership Team can't plainly state the answer? If no one can express this vital information clearly, how much business do you think they collectively miss that is right in front of them or degrees of separation away?

Knowing and communicating your Industry and Niche will make it easy for everyone in the organization to understand and explain what you do. This will make it much easier to reach potential clients and help narrow down the list of opportunities you spend time pursuing.

Determining your Industry and Niche also helps you avoid chasing distractors. Having worked with hundreds of visionaries, we've found that one of their inherent shortcomings is that they have more ideas than their company can pursue. Some ideas may be distractions that fall into the "nice to have" category instead of "need to have." It's important to carefully evaluate those ideas to see which ones most closely align with the organization's Vision.

Nailing your Industry and Niche is probably the easiest of our Focus Filter exercises. The answer should be a straightforward, one-sentence description. In his book *The Advantage: Why Organizational Health Trumps Everything Else in Business,* Patrick Lencioni posts several great examples:

- A power company: "We generate and deliver natural gas and electrical products and services to people throughout the state."

- A credit card company: "We provide payment products and extended credit to consumers."

- A technology hardware company: "We develop, manufacture, and market hard drives, solid-state drives, and storage subsystems for consumers, OEMs, and enterprises."

- A biopharmaceutical company: "We discover, develop, make, and commercialize better medicine through integrated sciences."

At Ninety, we are a learning, support, and technology platform that simplifies the hard work of focusing and aligning teams so they can thrive.

Industry and Niche Worksheet

What industry are you in?

What products or services do you provide?

Who are your clients or customers?

WRITE YOUR WHATS STATEMENT

Combine your answers into a simple sentence below. For example, "We provide dairy products throughout the tri-state area."

Keep it simple. As *Dragnet's* Joe Friday would say, "Just the facts, ma'am."

Ideal Customer

We can't exist without customers. As one of our seven primary stakeholders (see sidebar), they're critical to our success. Since our relationship with them will inevitably influence our organization's future, we should be intentional about the customers we attract and retain.

Many leaders underestimate the value of filtering prospects and customers. While it's tempting to cast a wide net for less-than-ideal customers, the short-term gain in revenue is rarely worth the long-term consequences.

Some customers can hinder progress toward our goals by siphoning resources, frustrating our people, and potentially harming our brand. Of course, these downfalls are rarely malicious — these customers are really just looking for something beyond what we're currently offering. That's why we teach the practice of identifying and attracting Ideal Customers who make our work worthwhile.

So how do you find Ideal Customers? The first step is defining the term for your specific company. Think about your Ideal Customer in terms of where they are (**geographics**), who they are (**demographics**), and what they value (**psychographics**).

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TYPES OF STAKEHOLDERS

As you'll read about in our Core Values section, we believe having high-trust relationships with our stakeholders is critical to an organization's success. To be a High-Trust Company, you must demonstrate high-trust relationships with 90% of your primary stakeholders.

1. Customers
2. Employees
3. Senior Leadership Team
4. Vendors
5. Strategic Partners
6. Investors
7. Community

Prioritizing the relationships with these groups when considering your Focus Filters is paramount to the longevity of your company.

Ideal Customer continued

Geographics — where your Ideal Customers are located: Do you want to serve customers within your area code, state, country, or beyond?

Demographics — measurable statistics of your Ideal Customers beyond location: Do you want to focus on companies of a certain size or within specific industries? Or do you want to reach more high-income families or individuals? First-time homebuyers or retirees?

Psychographics — the observed and hidden motivations of your Ideal Customers: What motivates your customers? What do they value? Do they care more about saving time or saving money? Why do they choose your company over others? How do they treat their suppliers and partners?

Ideal Customer Example

Software Company: Our Ideal Customers are IT directors for U.S.-based companies with fewer than 500 employees. These individuals are typically mid-career and supervise large teams. They value reliability and customer support and are willing to pay a premium for high-quality products.

Where are your Ideal Customers located?

Who are they? If you serve consumers, what income level and stage of life are they in? If you serve businesses, how big are they, and what industries are they in?

What motivates them? Why might they choose you over your competitors?

WRITE AN IDEAL CUSTOMER STATEMENT

Combine your answers into a brief statement. For example, "Our Ideal Customers are independently-owned auto repair shops in New England. They pride themselves on going the extra mile for their customers and are willing to pay more to work with a reliable auto parts supplier with outstanding customer service."

Our Ideal Customer

Would work be great if more than 90% of your customers were ideal?

Unique Value Proposition

Why do your customers choose you over your competitors?

Now that you're clear on your Whats, let's determine why your customers are buying from you. You attract and retain Ideal Customers through your **Unique Value Proposition** (UVP). Your UVP acts as a promise to your customers, and every team member must understand and appreciate the UVP to consistently deliver on that promise.

Your UVP is the reason your customers buy from you. Creating, building, and maintaining its collective advantage takes discipline.

The big idea associated with UVP is based on the book *The Discipline of Market Leaders* by Michael Treacy and Fred Wiersema. In their book, Treacy and Wiersema share why some people are loyal to one airline over another or are willing to spend more on designer handbags when more affordable options abound. They've come to expect that a company will continue to excel at whatever it does that separates it from its competitors.

In any competitive market, you'll notice that the leaders differentiate themselves with one of four Unique Value Propositions. We've added "Status" as a fourth UVP to the work of Treacy and Wiersema:

1. Lowest **cost** — you save them money.

2. **Innovation** — you found a new way to make their life better.

3. Extraordinary **customer service** — you make getting what they want or need easy.

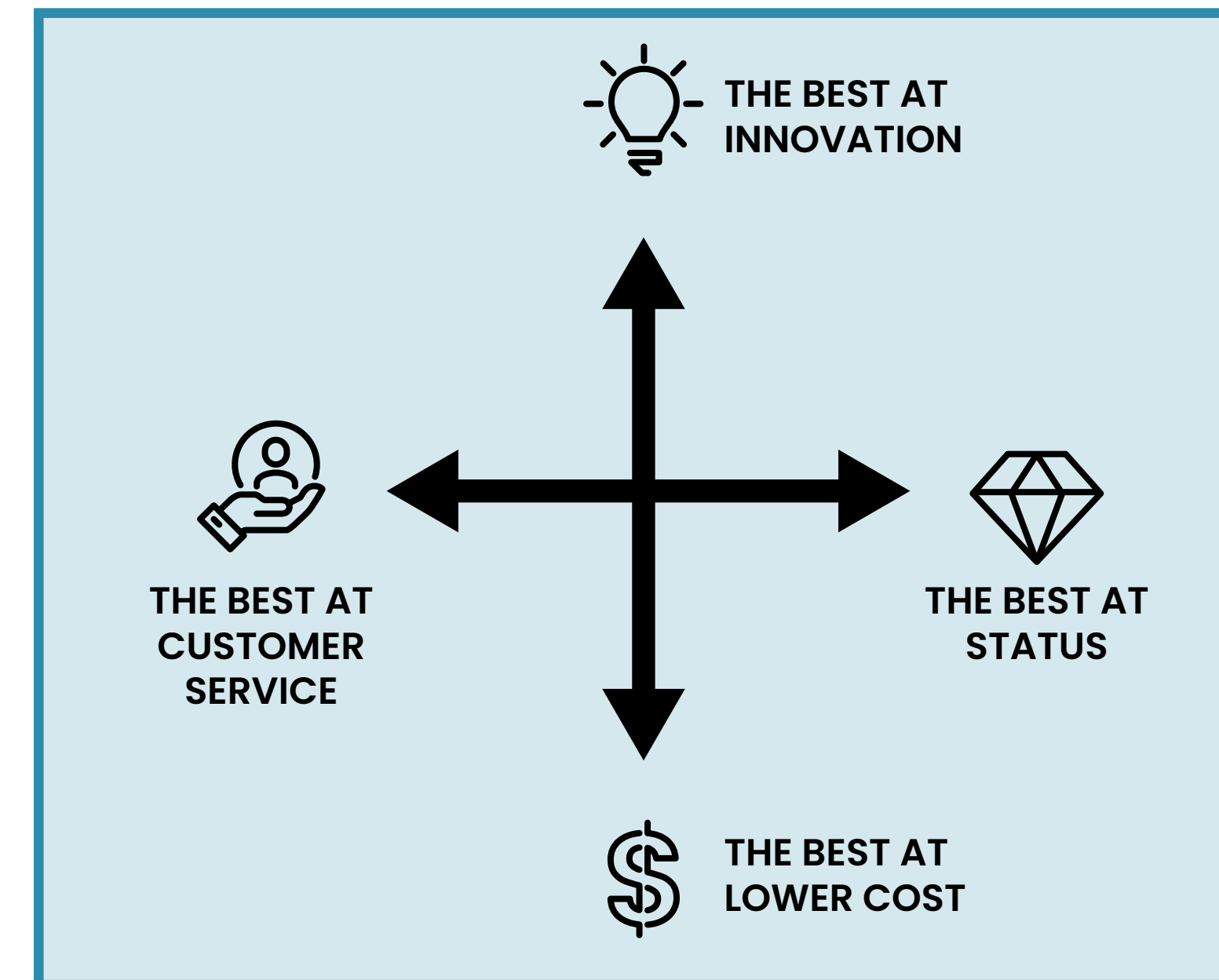4. Appealing to the buyer's need for **status** — you make them feel special.

Figure 2.1 The four most common Unique Value Propsitions (UVPs).

Unique Value Proposition
continued

A family looking for the lowest **cost** will likely shop for school clothes at Walmart rather than Nordstrom. Similarly, an individual may opt for a Gucci bag over a more affordable bag from Target because they desire the **status** associated with it.

Close your eyes and think out three years from now — imagine over 90% of your customers are ideal. Then, think about what you want them to share with others when they talk about your company. This is what Unique Value Proposition is all about.

Business expert and author Jim Collins talks about the Hedgehog Concept, named after an essay by Isaiah Berlin titled "The Hedgehog and the Fox." The story contrasts a cunning fox who knows many things and sees the world in all its complexity with the hedgehog who knows one big thing really well and embraces a simplified view of the world.

Collins wrote that fox companies pursue every opportunity and never become great at any one thing. On the other hand, hedgehog companies are exceptionally focused — they understand and concentrate on what they do best. In our terms, hedgehog companies are **Scalers**, and foxes are **Scalars**. Collins's research on hedgehog companies suggests that Scalers:

- **Know what they want** to be the best at in their market

- **Are laser-focused** on becoming the best at something very specific

- **Have extraordinarily clear and tight Focus Filters**

If your market is local, be the best at your UVP locally. If your market is national, be the best at your UVP nationally. If your market is global, be the best at your UVP globally.

Companies can always choose to excel at more than one of the four distinct UVPs, but you need to prioritize investing in and sustaining your primary UVP.

At Ninety, our primary UVP is customer service, our secondary is innovation, and we don't worry about being either the lowest cost or a status symbol.

When your team members embrace your Unique Value Proposition and your customers use your terminology when talking with others about why they love doing business with you, you'll be well on your way to having an extraordinarily focused, aligned, and thriving company.

What features and benefits motivate your Ideal Customers to buy from you?

Which of the four distinct Unique Value Propositions is the primary proposition for your business?
If there's a secondary proposition, what is it?

WRITE YOUR UNIQUE VALUE PROPOSITION

Combine your answers into a brief statement. For example, "Our customers choose our software products because they're easy to use and provide all the data they need to understand not only how they're performing but which of their Core Competencies have the most opportunity for improvement. When they need help, our company provides an exceptional customer experience and effective solutions."

Our Unique Value Proposition

A great UVP is one your Ideal Customers repeat when they talk about you with others.

Why are you pursuing this line of work? How is what you're doing worthwhile? Why does your company matter?

A vital part of developing a clear and compelling Vision is determining what Gino Wickman refers to as your Purpose, Passion, and/or Cause in his book *Traction* and what Simon Sinek calls your Just Cause in his book *The Infinite Game*.

Both approaches encourage us to articulate a clear and compelling reason for our company's existence and how it makes life better.

WHAT DID GINO WICKMAN MEAN BY PURPOSE, PASSION, AND/OR CAUSE?

- **Purpose** — the reason for which something is done, created, or exists

- **Passion** — strong and barely controllable emotion

- **Cause** — a principle, aim, or movement that, because of a deep commitment, one is prepared to defend or advocate for

WHAT EXACTLY IS SIMON SINEK'S JUST CAUSE?

> **"A JUST CAUSE IS A SPECIFIC VISION OF A FUTURE STATE THAT DOES NOT YET EXIST; A FUTURE STATE SO APPEALING THAT PEOPLE ARE WILLING TO MAKE SACRIFICES IN ORDER TO HELP ADVANCE TOWARD THE VISION."**
>
> **SIMON SINEK, *THE INFINITE GAME***

Organizations need to have a soul. At the center of your company's soul is a clear understanding of why your company exists and a commitment to making life better for all your stakeholders. Many leadership teams don't initially get this or buy in. Some leaders believe their company's purpose is to make money for the owners/shareholders. We get that. What we teach and what we believe is not for everyone — recall what we shared earlier: "We don't make money because we want to make money; we make money because someone values what it is we do."

We believe that all companies must provide a product or service that improves their customers' and stakeholders' lives. In the long run, no one will continue to buy from, join, or stay at your organization if you're not improving their lives. At Ninety, we deeply believe that the purpose of life is to make life better.

We aren't suggesting that you have to make everyone's life better — that's an impossible task. Focus on attracting your kind of stakeholders. These include Ideal Customers and Ideal Team Members who are attracted to and aligned with your Core Values and long-term goals.

Sharing a clear and compelling Purpose/Passion/Just Cause will attract team members who align with your organization and attract more loyal customers. Better yet, you'll have lower turnover among your Ideal Team Members and Ideal Customers.

A growing body of research links trust and a sense of purpose with increased oxytocin levels — the hormone responsible for warm, fuzzy feelings. Joy on the job comes from doing purpose-driven work with a trusted team. At Ninety, we deeply believe people want their work to make life better.

Nailing your Purpose/Passion/Just Cause can be challenging. Having worked with hundreds of leadership teams, we've found that about 25% of founders are very clear on how their company makes life better. Another 50% find that after brainstorming with their team (especially with a coach's help), it's relatively easy to nail the big idea within a few hours. The last 25% struggle and take weeks or months to crystalize their Just Cause. You are where you are, so don't worry if you don't nail this today.

Feel free to move on to the worksheet at the end of this section if you're already clear on your Purpose/Passion/Just Cause. If you need additional clarification, the following framing devices and well-known examples may get your creative juices flowing.

FINDING YOUR WHY

Try not to think of finding your Why as a marketing exercise. Your Why should be fairly straightforward to you, and so powerful that you want to share it with all your stakeholders.

Even if you never express your Why outside your organization, it informs your goals, processes, and motivations. As an example, your passion may be all about building a great company that endures for generations. To communicate that kind of Why, you may say, "We're building this company for our children's children, and every decision we make is with this in mind."

Here are some well-known examples of Purpose/Passion/Just Cause.

Community-Centric:
Nike: to bring inspiration and innovation to every athlete in the world.
eBay: to provide a global online marketplace where practically anyone can trade practically anything, enabling economic opportunity around the world.
Greater Cause-Centric:
Disney: to make people happy.
Merck: to preserve and improve human life.
Google: to organize the world's information and make it universally accessible and useful.
Johnson & Johnson: to alleviate pain and disease.
Humalytix: to elevate small and midsize organizations' productivity, humanity, and resiliency.
Innovation-Centric:
3M: To solve unsolved problems innovatively.
Customer-Centric:
Southwest Airlines: to champion the common man.
Amazon: to be Earth's most customer-centric company; to build a place where people can find and discover anything they want to buy online.
Starbucks: to inspire and nurture the human spirit — one person, one cup, and one neighborhood at a time.
Employee-Centric:
Marriott: to make people our #1 priority: treat them well, expect a lot, and the rest will follow.
Industry-Centric:
Chick-fil-A: to be America's best quick-service restaurant.
Boeing: to eat, breathe, and sleep the world of aeronautics.
LVMH: to provide the world with luxury products, elegance, creativity, and *art de vivre*.

Most organizations tend to look at this in terms of either:

- **Building vs. Solving**

  » Building includes Amazon, Boeing, 3M, and Starbucks

  » Solving includes Google and LVMH

- **Winning vs. Helping**

  » Winning includes Nike, Chick-fil-A, and eBay

  » Helping includes Disney, Merck, J&J, Southwest, and Humalytix

You'll know you nailed your Purpose/Passion/Just Cause when it's:

1	STATED IN THREE TO SEVEN WORDS
2	WRITTEN IN SIMPLE LANGUAGE
3	BIG AND BOLD
4	HAS AN "AHA" EFFECT
5	COMES FROM THE HEART
6	INVOLVES EVERYONE
7	NOT ABOUT MONEY
8	BIGGER THAN A GOAL

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Purpose/Passion/Just Cause Worksheet

1. Purpose	The reason something is done, created, or exists.
2. Passion	Strong emotions that drive us every day.
3. Just Cause	A future state so appealing that people are willing to sacrifice to reach it.
4. Why	The rationale for the company's founding and ongoing existence.

Write down (below or in Ninety) one or more of the above for your company.

A great Why never expires.

Compelling and Audacious Goals (CAGs)

For their book *Built to Last,* Jim Collins and Jerry Porras studied companies with decades of continuous success. Many exemplary "built-to-last" companies had a challenging and exciting goal that inspired people to work toward its success. Collins and Porras called these Big, Hairy, Audacious Goals — BHAGs (pronounced bee-hags). Although the term had yet to be coined, President Kennedy's goal of walking on the moon is a classic example of a BHAG.

Here are some more examples of famous BHAGs:

- **Starbucks:** Become the most recognized and respected consumer brand in the world.

- **Amazon**: Every book ever printed in any language, all available in less than 60 seconds.

- **Microsoft:** A computer on every desk in every home.

- **Stanford University:** Become the Harvard of the West.

When describing these kinds of organization-defining pursuits, we prefer the term **Compelling and Audciauos Goals (CAGs).**

To qualify as a CAG, a goal must be:

- Focused and simple to understand.

- Measurable (a SMART goal).

- Bold enough that it requires sustained attention from everyone in the company.

- Consistent with and passes through all your other Focus Filters.

- Bordering on impossible to an outsider but compelling and worth pursuing to your Ideal Team Members.

Your Compelling and Audacious Goals should be set far enough into the future to scaffold all your other goals toward — at least five years out. Many of our clients choose ten years. You'll likely have an intuitive sense of the time frame best for you and your organization.

Like each of your Focus Filters, your CAG doesn't need to be perfect. Most of our clients take 60 to 90 days to get everyone on the Senior Leadership Team 100% committed to their CAG(s). Creating your Vision is a process — not an event.

CAGs Worksheet

You have a great CAG if you can answer "Yes" to every one of the following questions inspired by Jim Collins:

- Do you find this CAG exciting?

- Is the CAG clear, compelling, and easy to grasp?

- Does this CAG connect to your core Purpose/Passion/Just Cause?

- Will this CAG be exciting to a broad base of people in the organization, not just those with executive responsibility?

- Is it undeniably a Compelling and Audacious Goal, not a lengthy, hard-to-understand, convoluted, impossible-to-remember mission or vision statement?

- Do you believe the organization has less than a 100% chance of achieving the CAG with current resources (50% to 70% chance is ideal), yet believe the organization can achieve the CAG if fully committed?

- Will achieving the CAG require a significant increase in the capabilities and characteristics of the organization?

Our company's dreams need to be big enough to fulfill all our team members' dreams.

What are you challenged and inspired to work toward? To start creating Compelling and Audacious Goals, consider goals that:

- Indicate you've succeeded in building a company you're proud of and could confidently hand off to the next generation of leaders.

- Will align and benefit all your stakeholders (customers, team members, Senior Leadership Team, vendors, strategic partners, investors, and your community).

- Make clear that the company's goals are big enough to support most of your team members' personal and professional goals.

Take your first shot at writing (below or in Ninety) your Compelling and Audacious Goals.

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Core Values

In addition to coining the term BHAG, *Built to Last* is also credited with introducing the concept of Core Values to corporate America. In the book, Collins and Porras make a compelling case that exemplary companies — those that generated significantly above-market returns for their shareholders for decades — adhered to a small set of vital and timeless guiding principles called Core Values.

"Value" represents the degree to which an action yields the desired effect. For example, suppose our objective is to create an environment where people feel welcome to explore their roles, accountabilities, and responsibilities creatively. In this case, certain policies and procedures can be valuable — avoiding micromanagement, promoting open conversation, encouraging input, and so on.

Great companies have Core Values that align the behaviors of their people, teams, and processes with their other Focus Filters. By purposefully defining our Core Values, we make them real and tangible so we can undertake cost/benefit analyses, make informed decisions, and Get Smart Stuff Done.

Here are a few reasons why Core Values are important:

1. Strongly-held Core Values tend to endure.

2. Core Values often reflect our beliefs on what "should be."

3. Every Core Value can be categorized according to its importance and relevance.

4. Core Values are measurable and can be deemed positive or negative.

Having Core Values simplifies our choices and makes it easier for us to Work, and through our Work, make life better.

> **Core Values are a small set of guiding principles and behaviors that Ideal Team Members need to consistently embody for an organization to thrive.**

CORE VALUE EXAMPLE

One of our Core Values at Ninety is "Team" — we emphasize collaboration, prioritize trust, offer support, and honor our agreements. Since this is core to who we are, we structure how we operate to promote this Core Value. To foster working as a team, we have an intentional meeting cadence, recognize teamwork, enable professional development, and use tools to stay accountable.

As you'll learn from the resource materials in our 90u Library, well-orchestrated meetings are necessary for a focused, aligned, and thriving organization. A snapshot of our meeting cadence for non-executive team members includes Weekly Team Meetings, weekly team leader and team member 1-on-1s, monthly department head check-ins, Quarterly Planning Meetings, Quarterly 1-on-1 Discussions, and Annual Planning Meetings. These meetings are an opportunity to check the status of our To-Dos, Rocks, and Key Performance Indicators (KPIs) and discuss any Issues so we have everything we need to fulfill our roles.

Trust is very important to us. With an influx of remote and hybrid work, the local talent pool has become a global ocean network. This increase in opportunities for our team members makes it even more critical that we hire, review, reward, fire, and recognize by our Core Values. Whenever we speak to the entire organization or to a department, we set aside time for Core Value shout-outs. Once started, this practice usually operates independently as team members and leaders recognize each other's display of our Core Values.

CORE VALUES AND ACCOUNTABILITY

We want our team members to be their best, so we offer a professional development program to fuel our people's inquisitive nature (another one of our Core Values). With a structure-first approach to our organization's Org Chart, our open jobs have specific roles, accountabilities, and responsibilities associated with their Seats. But in the final stages of the hiring process, we will always go for the candidate who is the right person — they embody our Core Values, fit our culture, and believe in our Purpose/Passion/Just Cause. Once we have the right people in the right seats, we can offer them the tools and resources they need for their career development.

Staying accountable, particularly in large, remote, or hybrid work environments, is simplified with the proper concepts, tools, and disciplines. As you'll read in the Appendix, we have an efficient process of working through Issues with our teams and forming agreements about work we own. One form of an agreement is a To-Do — a task we need to complete within the next seven days. Completing our To-Dos on time shows our commitment to our organization's goals.

CORE VALUES AND TRUST

Ninety's founder, Mark Abbott, wrote a series of essays on trust. In the series, he describes three dimensions of trust. Core Values are part of the Connection dimension of trust. You may notice that team members hired through your Core Values often find connecting with coworkers simpler than in previous professional settings.

A great set of Core Values makes attracting and retaining what Collins calls the **Right People** much easier. Collins writes extensively about Right Person, Right Seat in his book *Good to Great.* In it, he refers to Right People as those team members who share the company's Core Values and help to support a culture based on those values. The Right Seat means a team member has the **Competency, Commitment, and Capacity (CCC)** for their seat.

- Competency — they possess the competencies required to succeed in the Seat.

- Commitment — they're genuinely committed to being great in the Seat.

- Capacity — they have the mental, physical, and emotional capacities to excel in the Seat.

CORE VALUES AND THE BAR

At Ninety, we're all about putting the Right People into the Right Seat. We use a simple rating system (outlined in the sidebar to the right) to determine cultural fit.

As you implement your Core Values, you'll need to review all of your existing team members — including SLT members — to see if anyone is below the bar.

The bar for your company represents the minimum ratings you'll accept. At Ninety, anyone who scores a "-1" with a Core Value or is determined to be a "no" in terms of whether or not they have the CCC for their Seat is below our bar. In addition, since we're very focused on having a strong culture, we'll also deem a team member below our bar if they score more than two "0s" regarding one of our six Core Values.

Once someone is deemed below the bar, we'll do everything we reasonably can to help them get above the bar. Our experience as leaders and coaches is that some people are simply unwilling to change their behavior or put forth the effort to grow to have the CCC for their Seat. While it's never easy, we know that letting these people move on with dignity is right for us all over the long run.

RATING BY YOUR CORE VALUES

Once your Core Values are clear, it's time to use them to rate the cultural fit of your team members and prospective hires.

At Ninety, we use a a Core Values rating system of -1, 0, 1, and 2.

2	Exemplifies
1	Good
0	Neither great nor bad
-1	Antithetical behavior

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Core Values Need to Endure

If you've already built out your Core Values, are you and your colleagues confident that they will stand the test of time?

In our coaching experience, most SLTs generate an excellent initial list of Core Values within an hour. We load this list into the Core Values section of Ninety's Vision tool and add descriptors.

Then, we ask the team to sleep on the list and tweak it as needed until they deeply love their Core Values. Typically, the list is ready to publish and share by the end of our second or third session.

While we love all aspects of coaching, helping teams nail their Core Values is one of the most rewarding things we do.

Rock-solid Core Values have three common traits — they're important, relevant, and enduring.

It's a worthy exercise to run each of your proposed values against these questions:

- "Is this value truly **important** to us as individuals and as an organization?"

- "Is this value **relevant** — is it essential to who we are, and does it apply to every person in our organization?"

- "As time passes and we navigate future changes, will this value **endure**?"

Use the following diagram (Figure 2.2) to evaluate your current Core Values (if you have them) or to help develop them (if you don't).

Proposed Core Values	Important	Relevant	Enduring
CV#1	✓	✓	✓
CV#2	✓	✓	?
CV#3	✓	✓	✓
CV#4	?	✓	✓
CV#5	✓	✓	✓

Figure 2.2 Core Value analysis chart to quickly identify behavior characteristics that are important, relevant, and enduring.

This simple analysis tool enables you to craft more meaningful Core Values. If you can't check the answers across the board, take advantage of one or both of the exercises you'll find in this section.

As Collins and Porras presented in *Built to Last,* enduring companies are founded and later led by individuals who provide their organizations with strong and well-defined philosophical belief systems and work to ensure those systems endure.

In short, genuine, well-crafted Core Values are one of the essential ingredients you'll find in virtually every great company. They help distinguish between important and unimportant, desirable and undesirable. They help us find our kind of people and steer clear of the wrong people. These tightly aligned markers guide us toward specific actions and help us reject others. They're critical to building and maintaining an extraordinarily focused, aligned, and thriving organization.

HOPEFULLY HELPFUL HINTS

- Your Core Values should be authentic and clear, with easily remembered stories associated with them.

- Use the antitheticals of your Core Values as red flags when hiring.

- Patrick Lencioni, author of *The Five Dysfunctions of a Team*, suggests searching for a non-traditional word or phrase to harness as a Core Value to help author a unique story behind the brand.

EXERCISE #1: FOR YOU ALONE

If you don't have Core Values you love, what behavioral norms, philosophical beliefs, or guiding principles do you find sacrosanct (important, relevant, and enduring)? List three to seven. As you formulate your answers, consider that well-defined Core Values clarify who you are. They also:

- Articulate what you stand for

- Explain why you do business the way you do

- Communicate your business processes

- Are compatible with your Unique Value Proposition

- Guide you on who to hire and why some people don't fit

- Inform how you reward and compensate

- Show your desire to retain and nurture talent

- Model how you teach

- Unify the whole organization

- Require no external justification

- Endure

Write your Core Values below or in Ninety.

Core Values	Important	Relevant	Enduring

Great Core Values simplify hiring, retaining, rewarding, firing, and recognizing.

EXERCISE #2: FOR YOU AND YOUR TEAM

Here's a summary of how we help our clients find and articulate their Core Values.

1. Have the SLT create a list of 10-15 team members they love working with the most. Ideally, most SLT members know these team members.

2. Present the Three Dimensions of Trust and list the Connection-based behavioral traits they love about each of the team members on the list. You might even think of specific stories or moments that make these team members memorable.

3. Write the words and short phrases that describe these Ideal Team Members on a whiteboard or displayed screen.

4. Next, ask each SLT member to share the names of past or present colleagues who were or are difficult to work with.

5. Share behaviors, habits, and traits of these non-ideal team members — aim for five to seven individuals and document the listed attributes with the others.

6. Locate opposite traits (antitheticals) and mark like pairs — for example, "Gets Smart Stuff Done" is antithetical to "Waits for explicit direction."

7. Prioritize your list by noting where there's a clear set of positive traits with associated antitheticals. Pay close attention to the positive behaviors that can be matched with an antithetical that's a real problem.

8. List around five ideal characteristics that you want 90% of your team members to possess.

9. Scan the list of desired behaviors for a word or phrase unique to the organization (those are almost always the most meaningful or powerful Core Values).

10. Perform an honest check-in to see if the remaining traits are words or phrases you've already used in your established culture.

11. Simplify your list and discuss until the SLT is satisfied.

12. Agree on your Core Value Rating System (see page 45 for ours).

13. Have every member of your SLT honestly rate themselves and each other against this draft of your Core Values.

14. Lastly, rate three of your best and three most challenging team members. If these Core Values align with your best colleagues and help you better understand why working with your most challenging colleagues is difficult, you're well on the way to sharing them with the company.

3-Year Goals

We deeply believe in the power of simplicity.

Part of leading is creating a compelling and memorable picture of where you want to go and providing enough detail so that everyone in the company is on the same page concerning what really matters — your Focus Filters.

A well-crafted set of 3-Year Goals helps you and your company take the big steps needed to turn your Compelling and Audacious Goals (CAGs) into reality.

We recommend committing to 3-Year Goals that:

- Are simple to communicate and understand

- Create a clear and compelling picture of what's important

- Are consistent with your CAGs

- Include a short list of operating metrics (such as the number of units sold) that help frame what's essential

- Show your team members a better sense of how their roles, KPIs, and goals contribute to turning the CAGs into reality

- Help people visualize where the company is going

Less is more until it's not.

When creating 3-Year Goals, the top priority is to predict and commit to a specific level of growth.

While it may sound cliché, the adage that companies either grow or die is true for most organizations. You'll need to achieve a certain level of growth to attract and retain great team members and customers. The exact growth rate depends on your industry and your Stage of Development.

Your organization is a bundle of energy. Research into the prospect theory model of goal behavior demonstrates that performance is optimized when we apply an appropriate level of stress or tension.

For example, we can spread the potential stress of our work across a graph and measure it against anticipated performance. The Yerkes-Dodson Law (Figure 2.3) holds that the resulting data shows a bell curve distribution — proving that finding the right amount of tension, stress, or pressure (called arousal) will yield optimal performance.
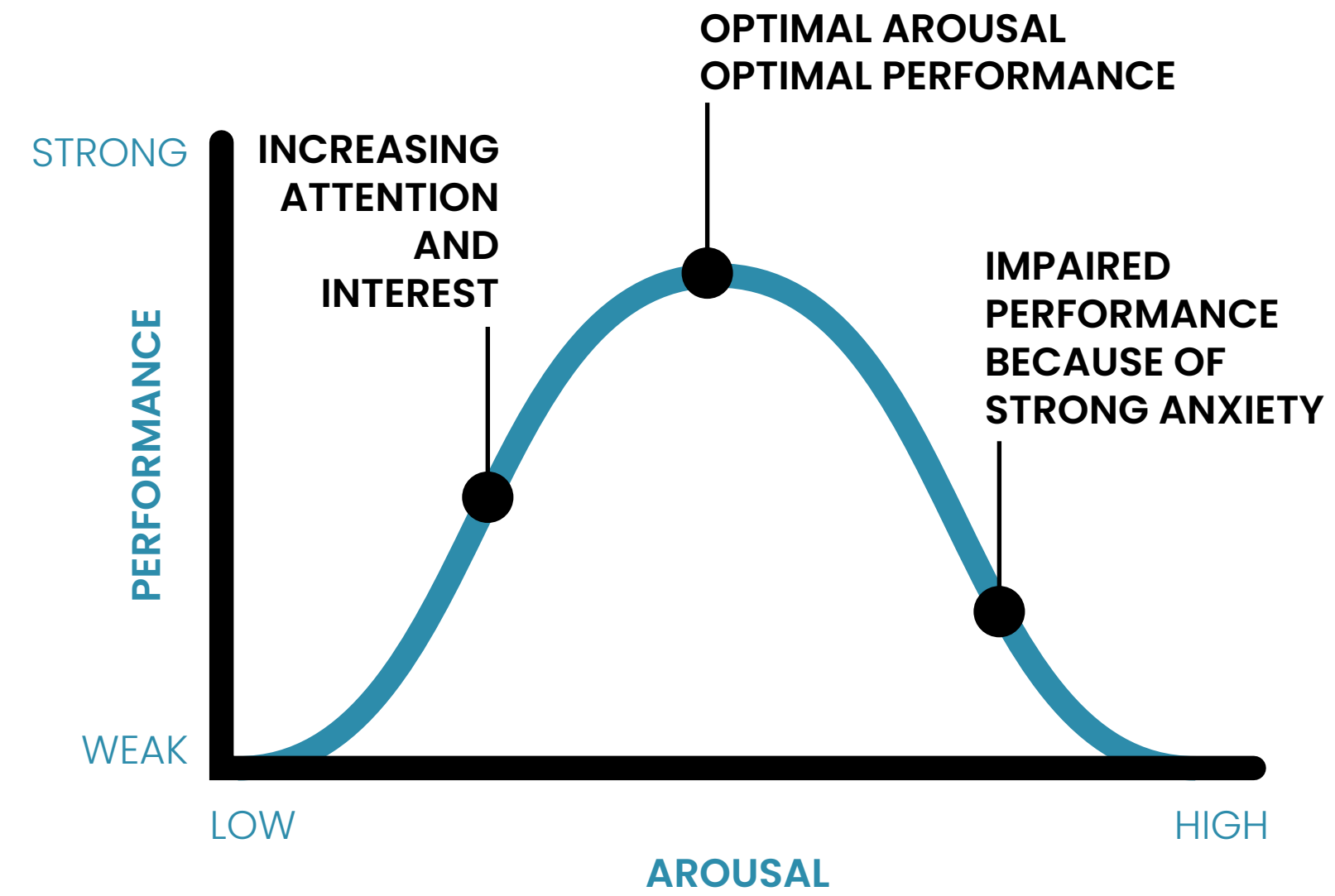
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Figure 2.3 The Yerkes-Dodson Law maintains that strong performance is achieved through an optimal amount of difficulty in the tasks at hand.

The book *Flow: The Psychology of Optimal Experience* by Mihaly Csikszentmihalyi offers additional insight into the Yerkes-Dodson Law. This popular work in psychology circles details how complex challenges can lead to growth and enjoyment. The theory applies to people as well as companies. As leaders, we want to find the "just right" level of challenge: not too much or too little.

Challenge your teams too little, and people will leave due to boredom or disinterest — but challenge them too much, and people will become stressed out and anxious. They'll either leave or become less and less productive. Your job as a leader is to create challenges that enable your team members to be appropriately challenged and fully immersed in their Work.

You know what this immersion, or flow, feels like (Figure 2.4) — it's those times when you're so fully engaged that temporal concerns (time, food) fade away.

Finally, related research suggests that learning is optimized with a 15% failure rate. If your organization is not failing around 15% of the time (not hitting one of your Rocks or Goals), you're probably not applying the optimal amount of tension.

You and your SLT must agree on a growth rate and how it translates into your revenue and profit goals three years from now. You'll also want to define up to three Key Performance Indicators (KPIs) needed to achieve these financial performance goals. KPIs may be units sold, customers served, net promoter score, contracts completed, or other progress markers.

You want to commit to targets that will challenge your organization and keep your teams engaged. Be thoughtful about allocating scarce resources like time and capital. In our experience as company builders, coaches, and investors, being overly conservative is just as dangerous as being excessively aggressive. We hire and invest as we grow because over-hiring or over-investing is just as dangerous as under-hiring or under-investing.

That's the setup. On the next page, we'll ask you to put some initial stakes in the ground.
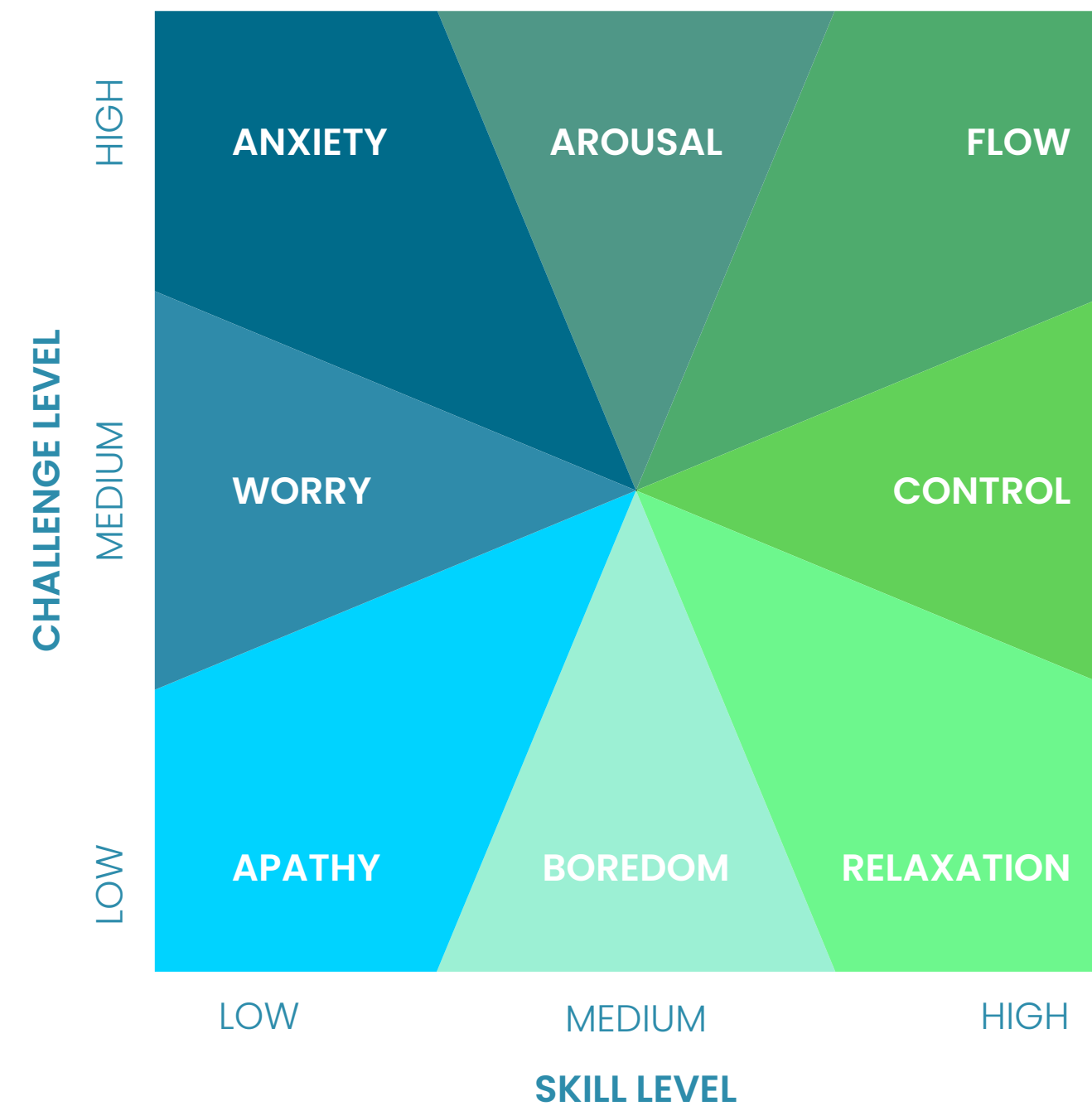
Figure 2.4 Finding work that puts us into a flow state involves balancing challenge and arousal — the stress, tension, or bandwidth required.

STEP 1. PREDICT AND COMMIT

Let's begin by establishing a process that creates 3-Year Goals to share with the entire organization. We recommend getting your Senior Leadership Team to focus on the following:

- **A specific future date.** Most companies choose the end of a calendar year as a goal's deadline.

- **One, two, or three financial goals.** These typically include revenue (gross or net) and a key metric that helps your team appreciate the importance of operating efficiently.

- **One, two, or three KPIs.** With those financial goals set, what are the one, two, or three KPIs you'll need to hit to achieve those financial results?

What date are you targeting to have your 3-Year Goals completed by?

What financial information are you willing to share with the whole organization? Think about which revenue and indicators of profitability (such as contribution margin) would provide clarity and promote trust.

What goals could you create for your organization's revenue or profit?

Revenue   Profit

What are three KPIs that would indicate you've reached these financial goals? These should be easy to measure progress markers like the number of Ideal Customers, prospects in the funnel, or new clients.

1.

2.

3.

53

3-Year Goals continued

STEP 2. ENVISION

Once you've taken an initial pass at defining these goals, think about what the company needs to achieve between now and then. Remember, your dream has to be big enough to incorporate the dreams of your current and future team members.

Ask yourself whether you have or need:

- New products

- New markets

- New awards (for example, Great Place to Work status)

- Technology upgrades

- Percent of Ideal Customers

- Number and percent of Right People, Right Seats

- A new learning management system

- A Head of Product or another department

What things demonstrate growth and progress for you and everyone in the organization? Avoid writing paragraphs — a list of bullet points is fine. Just get your ideas flowing.

STEP 3. AGREE ON YOUR LEVEL OF TRANSPARENCY

Most leaders are reluctant to share financial information with their team members. The fears are numerous and almost always trust-based. The irony is that withholding financial information reduces your team's trust in the SLT. In addition, your average team member almost always thinks you're making millions more than you are. People tend to make false assumptions when they don't know something.

How much do you plan to reveal about the status of company revenue and profitability?

How do you plan on informing your organization?
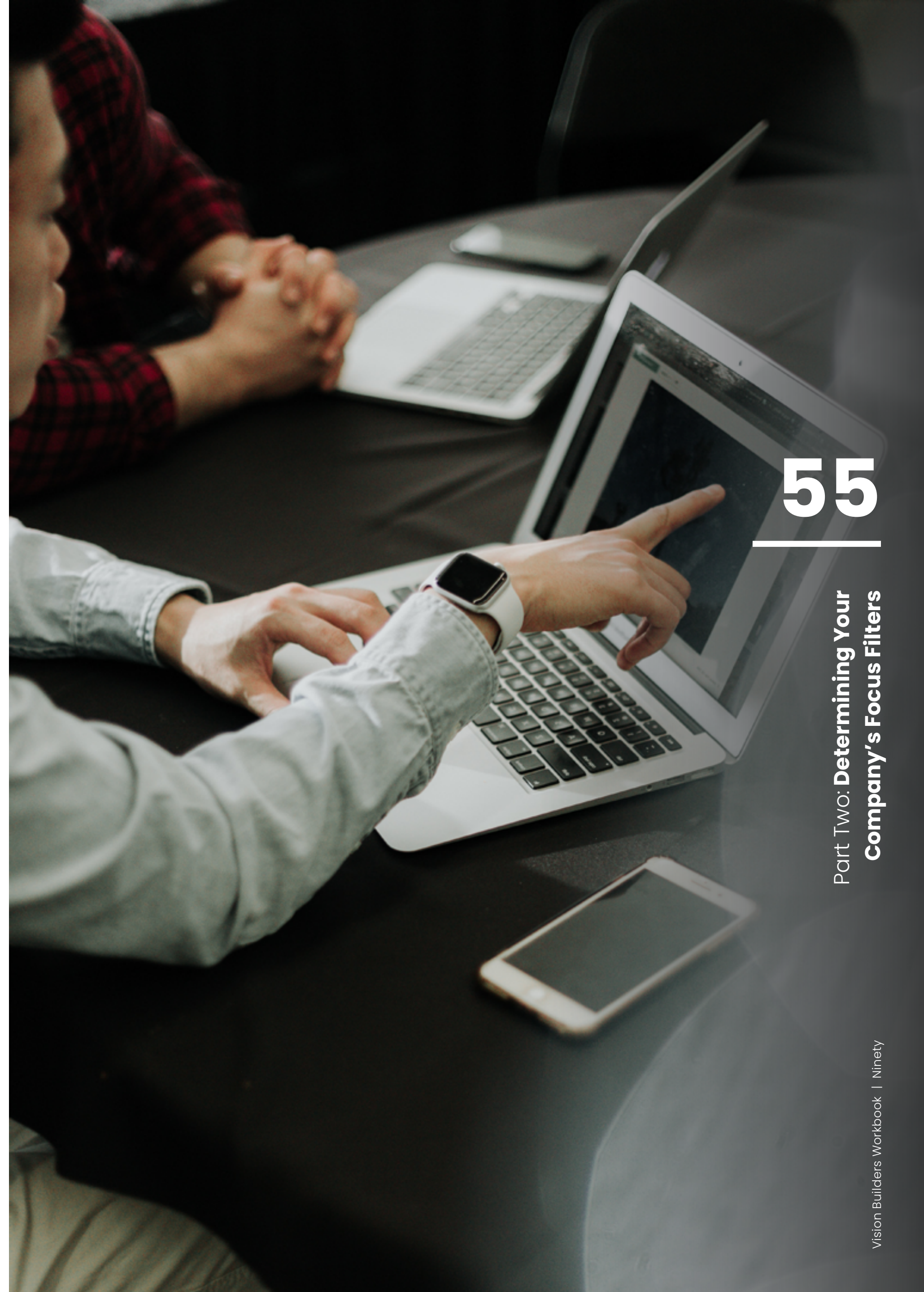
STEP 4. VISUALIZE AND VERBALLY COMMIT

Your 3-Year Goals are locked in when you and the SLT fully agree and commit to turning them into reality.

Before you share your 3-Year Goals with the rest of the organization, it's wise to ask your SLT to visualize what your company will look like after achieving your 3-Year Goals. Consider asking some of the following questions to the SLT to verify everyone is on the same page.

"Can you see this?"

"Do you want this?"

"Would this be exciting and achievable for all?"

"Will it increase our odds of achieving our CAG(s)?"

▼

Now that you've set your CAG(s) and 3-Year Goals, it's time to create 1-Year Goals. Like the others, they should be captivating and achievable while helping you stay on track.

Just like we recommended with your 3-Year Goals, you'll need to decide on your revenue and operational goals for the end of this year (if it's the first half of your year) or the end of next year. Remember, less is more until it's not.

What date are you targeting to complete your 1-Year Goals?

Next, you'll need to decide on your 1-Year company goals. The more goals you and your colleagues take on, the less likely you'll be to reach them all. Our experience as coaches, company builders, and investors strongly suggests that **three to seven company goals are ideal**. A good guiding principle is for the number of 1-Year Goals to be no more than the number of individuals on your SLT.

What 1-Year Goals could you create for your organization's revenue or profit?

Revenue   **Profit**

What are three KPIs that would indicate you've reached these financial goals? These should be easy to measure progress markers.

1.

2.

3.

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1-Year Goals
continued

At Ninety, we strive to better understand the neuroscience associated with goal-setting. Here are a few takeaways from available research.

- **Performance increases when people have specific and challenging goals** — "A Prospect Theory Model of Goal Behavior," George Wu, Chip Heath, and Richard P. Larrick, *Psychological Review.*

- **We benefit from missing some of our goals, possibly up to 15%** — "The Eighty-Five Percent Rule for Optimal Learning," Robert C. Wilson, Amitai Shenhav, Mark Straccia, and Jonathan D. Cohen, *Nature Communications.*

- **The ability to tackle novel challenges and create goals is, perhaps, uniquely human, yet not limitless** — "The Neuroscience of Goals and Behavior Change," Elliot T. Berkman, *Consult Psychology Journal.*

Remember that creating soft goals for achieving 100% success won't create the environment needed to attract and retain the right talent to realize your Vision.

It's wise to check with department heads about the feasibility of your desired goals. Will they need more staff or resources to reach these goals? Can you budget to provide those resources? Do we have an agreement?

Share the draft of your 1-Year Goals with your SLT to get help turning your agreements into a formal document (saved in Ninety's Vision tool, for example).

What company goals are compelling and achievable during this period? Feel free to write them down below or put them in Ninety.

1.

2.

3.

4.

5.

6.

7.

8.

If necessary, go through a "keep, kill, or combine" exercise to solidify your list of goals further. Finally, have your SLT verbally commit to your organization's 1-Year Goals.

Are you and your SLT in agreement on the 1-Year Goals that will keep you on track to achieve your 3-Year Goals and CAGs?

When your 1-Year Goals are ready, share them with your team members and desirable recruits interested in your company.

> **The best goals are both challenging and achievable.**

90-Day Goals – Rocks

▼

If you decided to take this workbook "to the mountains" and you filled out the previous sections, now is a good time to pause. Sit back and enjoy all the hard work you've done. Take a hike. Eat a good meal. Appreciate the beauty of life on Earth and reward yourself for creating space to plan for your company's future.

We know how hard it is to build a great company. We understand the trials and tribulations of leading, coaching, and caring for people. We feel the weight of trying to do the right things and the responsibilities of being a leader. While you bear the majority of this burden, the other members of your SLT do, too.

For their sake, you should wait before writing down a bunch of 90-Day Goal (aka Rock) candidates. Your colleagues are likely knee-deep in their unique challenges and projects. They're deep in their day-to-day reality of running the company and know best what is both important and urgent.

Once you're ready to "head down from the mountain," we recommend sharing copies of this completed workbook with your senior colleagues. Let them read it and reflect on it. Then schedule two to four off-site meetings.

Set aside either two full day, or four half day, non-contiguous days to discuss the sections of your Vision with the team. The goal is to agree on 100% of the Focus Filters associated with your Vision and then to align on your goals. We've built a Meetings tool and in-depth guides for these meetings to help you go from A to Z.

Together, you can build an extraordinarily focused, aligned, and thriving company with the power to turn your Vision into reality. That said, feel free to use the following page to write down some great Rocks for consideration.

90-Day Goals Worksheet

Over the next 90 days, what can you do to help your team consistently hit their targets, boost transparency, and increase accountability? Feel free to write below or in Ninety.

1.

2.

3.

4.

5.

6.

7.

8.

What are the steps forward to get from here to there? How can you accomplish more goals on the way to your long-term goals?

90-Day Goals should be created and agreed to by the team.

Part Three:
Getting Everyone on Board

Rolling Out Your Vision

We sincerely encourage you to share your Vision with all your team members, board of directors (if you have one), investors, key customers, and vendors.

You want to ensure your closest stakeholders understand your Vision and support making it come to life. We know no other way to make this happen than for you to share it with them at least quarterly so they can see progress and feel like they're valued partners in your success.

The rest of this workbook will provide you with some suggestions for how to get from here to there.
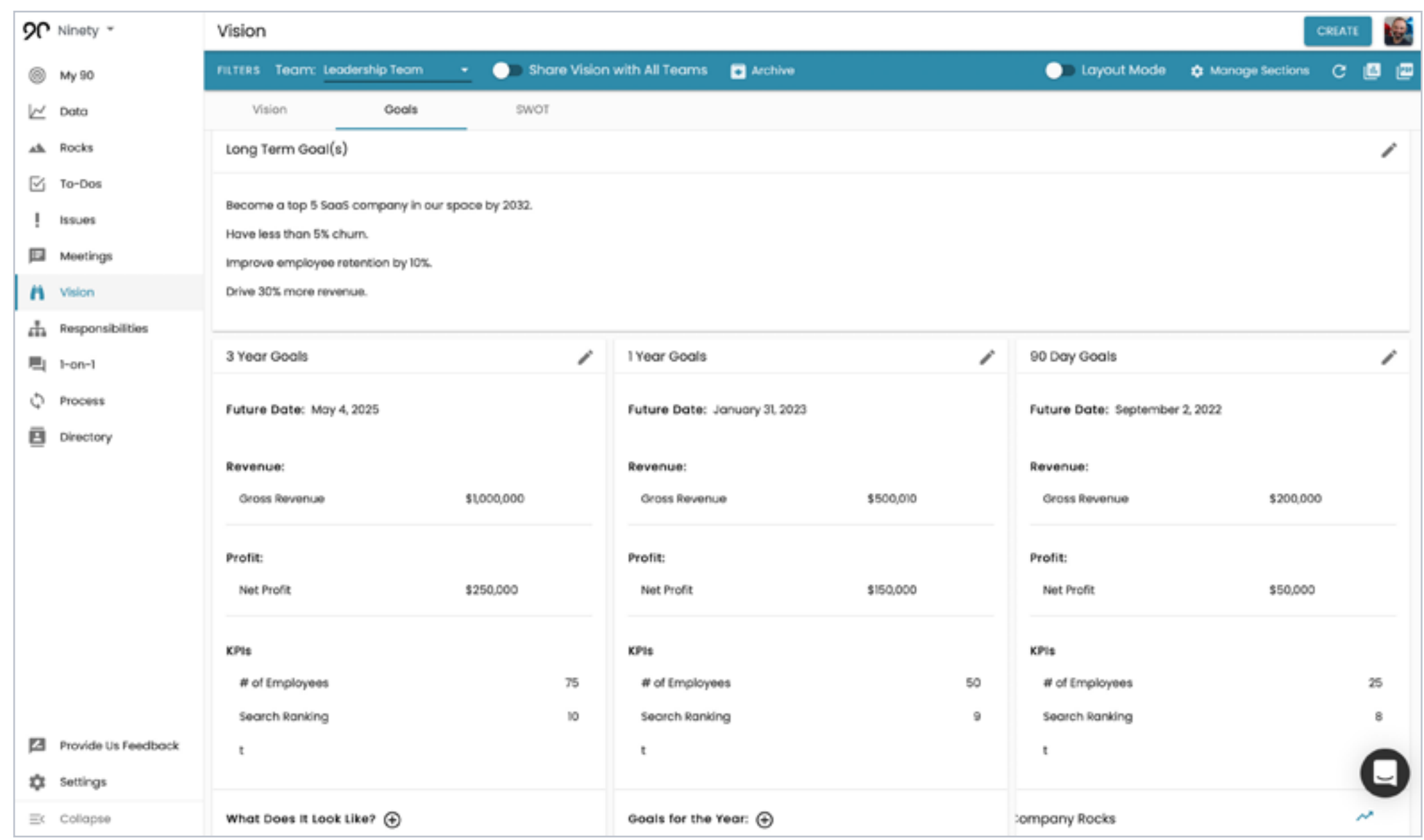

Figure 3.1 Ninety's Vision tool allows you to describe your organization's goals in great detail.

If you've been Vision-building alone, use this section to help bring your Senior Leadership Team on board. Remember, an organization's Vision is the definition of itself and the expression of its highest aims — it defines how the company's people work (hopefully Work) to make their dreams a reality.

> Work with a capital W is all about the Work we love doing. With the increased amount of choice so many of us have in the New Age of Work, pursuing Work you're passionate about is one of life's most under-appreciated gifts.

As we shared earlier, when you're ready to begin collaborating with the rest of your leadership team, we recommend scheduling two all-day or four half-day off-site meetings. We call them Vision and Goal Setting Sessions. The objective is to have the entire Senior Leadership Team agree and commit to the pillars of your Vision — your Focus Filters. Once your SLT has agreed and committed to the Vision, the organization can focus on determining how to get from here to there.

After the Vision Setting Session, plan to wait at least 30 more days before holding the Goal Setting Session. The intention here is to turn the unified Vision into steps needed to make it a reality.

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The Vision Setting Session

We teach that the great companies of the present and future will graduate from an expectations-based culture to an agreements-based one. The primary goal of the Vision Setting Session is to establish a set of essential agreements concerning:

- **What** you do (Your Industry and Niche)

- **Why** you do it (your Purpose/Passion/Just Cause)

- **Who** you serve (your Ideal Customer)

- **How** you serve your Ideal Customer (your Unique Value Proposition)

- **Where** you're going (your Compelling and Audacious Goals)

- **Who** you are as a group (your Core Values and Culture)

Agreements help us promote a high-trust culture by giving agency to the rest of our team. Expectations are one-sided, while agreements foster involvement and solicit input from your team members.

We use a specific meeting agenda for our Vision Setting Session, which we'll explore next.

Read more in this workbook's Appendix about how To-Dos are agreements you can easily incorporate into your daily business operations.

The Vision Setting Session Agenda

This meeting is a departure from the daily routine of running your business to pause and review your work and the work that lies ahead to bring your Vision to life. Bring all your notes and answers from Part Two to this meeting. Feel free to repeat many of the same exercises you went through "on the mountain" with your SLT.

All agendas in the Ninety platform are customizable to fit your needs. We built the following agenda into the standard version of Ninety's Vision Setting Session.

1. OBJECTIVES

The Facilitator aligns the group around the outcomes to achieve during the session. For the Vision Setting Session, the primary objective is to have the entire Senior Leadership Team agree and commit to the non-goal-based Focus Filters of your Vision.

2. AGENDA REVIEW

Set the stage with an overview of the session's events and a summary of each agenda step.

3. CHECK-IN

We always recommend beginning a meeting with a personal connection. We're more than cogs in a machine; we're humans who want to improve our customers' lives and each other's. Have everyone share a personal and professional best from the previous week.

The work ahead will be arduous. Beginning the session with this human connection promotes a trusting environment that can be recalled later if discussions become agitated.

Finally, share with the team the purpose of the session — "The purpose of the Vision Setting Session is to establish who we are, what we stand for, who we serve, how we market ourselves, and where we want to be in ten years. In our next session — the Goal Setting Session — we'll work on getting 100% aligned and in agreement on how we'll get from here to there."

4. INDUSTRY AND NICHE

As we discussed in Part Two, your industry and niche are your Whats. This should be the easiest step for the team to identify and agree on. The final result should be a one-sentence description of what you do.

5. IDEAL CUSTOMER

Your Ideal Customers are who you want to serve. Customers are ideal when they embody a specific mix of geographic, demographic, and psychographic characteristics. Recognizing your Ideal Customers increases your company's ability to saturate your desired marketplace, retain clients for the long term, improve customer satisfaction, and simplify marketing efforts.

6. UNIQUE VALUE PROPOSITION

Your organization's Unique Value Proposition (UVP) is how you pique the interest of your Ideal Customers. The four most common UVPs are having the lowest cost, improving lives through innovation, providing extraordinary customer service, and increasing actual or perceived status. Your UVP is often why your customers choose you over your competitors.

7. CORE VALUES

A great company's Core Values become a critical filter for simplifying how we behave as people, who we hire, and how we work together. If you agree with us that great companies should also be High-Trust Companies (HTCs) with an extraordinary culture, then take particular care when finalizing your Core Values. We highly recommend repeating the Core Values exercise with your SLT if you haven't already. Core Values should always be important, relevant, and enduring.

8. PURPOSE/PASSION/JUST CAUSE

Why are you in business? This question is a natural extension of our earlier inquiry about what you do. Your Purpose/Passion/Just Cause resembles your reason for the company to exist, your devotion to what you do, and your dream of the future. We believe that all companies must provide a product or service that improves their customers' and stakeholders' lives. These Whys provide substance to your company — an essence that will attract and retain your Ideal Team Members and Ideal Customers. Providing this sense of a higher purpose for your company will help you stand the test of time — as we like to say, a great Why never expires.

9. COMPELLING AND AUDACIOUS GOALS (CAGS)

Think big. Really big. Your Compelling and Audacious Goals should be so challenging and exciting that they inspire the entire organization. Ensure your CAGs connect to your Purpose/Passion/Just Cause. They should also be set far enough into the future that your other company goals are building toward the CAGs.

10. NEXT STEPS

Discuss with your SLT what remains to be done — establishing 3-Year Goals, 1-Year Goals, quarterly Rocks, Long-term Issues, Short-term Issues, and To-Dos.

11. CONCLUDE

Celebrate all the progress that you made today. Invite the team to continue thinking about everything you've discussed and set a date for the Goal Setting Session at least 30 days after this session.

Finally, have everyone rate the session on a scale of one to ten. Invite anyone who rates below a nine to discuss any improvement opportunities.

Keep up the good work toward building your Vision. The following section outlines actionable and immediate steps for your organization over the coming weeks, months, and years.

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The Goal Setting Session includes many of the topics that are also found in the SLT's Annual Planning Meeting. This meeting reflects on the company's past while meticulously planning its future in incremental steps.

1. OBJECTIVES

As with the Vision Setting Session, start the day by aligning your team. With long-term goals and strategies established, use this session to plan for the immediate future.

2. AGENDA REVIEW

Provide an overview of the agenda items and discussion topics. Give the team an idea of where the session is going so everyone can focus on the tasks at hand.

3. CHECK-IN

Once again, start with a Segue to bring everyone's attention to the moment at hand with a human connection and preparation for setting your company's goals.

4. REVIEW YOUR INDUSTRY AND NICHE, IDEAL CUSTOMER, UNIQUE VALUE PROPOSITION, CORE VALUES, PURPOSE, AND CAGS

Reflect on what you accomplished in the Vision Setting Session. Your team established several Focus Filters — the guiding principles of your organization. Use these Focus Filters to simplify decision-making and align your teams. If you're using Ninety, these elements can be easily stored and shared with our Vision tool.

5. 3-YEAR GOALS

Nested just below your CAGs are 3-Year Goals (though you can select a different interval of time). Meeting these goals puts you on the right path to accomplishing your CAGs. Introduce a challenge to inspire your team and help everyone in the company envision their path.

6. 1-YEAR GOALS

In the next 12 months, what needs to happen to stay on track towards your 3-Year Goals? Turn your answers into 1-Year Goals. Three to seven company goals are ideal here. 1-Year Goals should captivate your company while creating a challenge worth conquering.

7. ROCKS

Now that you have specified several 3-Year Goals and 1-Year Goals, take the time to think closer to the here and now. Your Rocks are the ledge up the mountain to reach in the next 90 days. Rocks are owned by one individual, but the components of the Rock, Milestones, should be delegated to team members as needed. Each Milestone has a due date. If you're using Ninety, the platform automatically makes To-Dos seven days before a user's Milestone is due.

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8. ISSUES LISTS

Ideally, you and the SLT have also generated lots of ideas and projects that haven't found a home in any of your goals yet — capture these ideas in one of two Issues Lists. For items that can wait until next quarter or later, document them in the Long-Term Issues List. For anything with priority in the next 90 days, use the Short-Term Issues List. These Issues can be cascaded to various teams across the organization to keep everyone focused on working toward common objectives. Next, if time permits, feel free to solve some of the bigger Issues that you didn't address by creating either a Goal or Rock. To get to work on addressing these Issues, you can use our Issues Priority Ratings System in Ninety and begin mastering our Issues solving framework — Raise, Discuss, and Resolve (RDR). As you solve Issues, use Ninety to assign To-Dos to team members easily.

9. NEXT STEPS

Ensure that the next steps you've planned (Rocks, Short-Term Issues, and To-Dos) are assigned to a person responsible and accountable for the task. Be prepared to provide complete information to that team member on what it takes to accomplish the task.

10. CONCLUDE

Offer a time to share feedback on the day. Have everyone in attendance rate the meeting on a scale of one to ten. If any participants score the meeting below a nine, discuss what can improve for the next meeting.

It's worth saying here that Vision building is never truly finished. During your Quarterly and Annual Planning Meetings, it may be necessary to adapt elements of your Vision as your company grows. Completing this workbook and holding Vision and Goal Setting Sessions are tremendous strides toward creating a great company that is focused, aligned, and thriving.

> **For more information on Vision and Goal Setting Sessions, visit our 90u Library.**

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The number one reason our team members don't seem aligned with leadership is that we haven't taken the time to explain our business to them. We need to share:

- How we matter

- Where we're going

- Why we do the things we do

- The principles that help guide what we do

- Why certain things matter more than others

- Why certain priorities are more important than others

We're entering into a New Age of Work that we refer to as Work 8.0: The Age of Understanding. Here are seven points that describe this new age:

1. People have never had as many opportunities to find excellent employment in the history of humankind.

2. Gone are the days of "Do it because I said so." People want to understand the context behind our decisions.

3. People want to know how we make decisions and see that we're genuine.

4. People want to work for employers who are making life better, and they want to be proud of their company.

5. People want to work for companies that matter and do work that matters.

6. People want to know that their company is helping them grow and become better versions of themselves.

7. People want to know that the company's dreams are big enough to fulfill their dreams.

In short, belonging to something we're proud of has never been more critical. Sharing your Vision helps everyone in your company better appreciate why the company matters, why they matter, and how they fit into the Vision.

Put as much care into sharing the Vision with stakeholders as you did in developing it. Start by sharing the Vision internally. This gives team members time to understand the plan before you share it with stakeholders outside the company.

If possible, schedule an in-person meeting with the whole company so you can read people's body language, take questions, and observe the energy in the room. Our experience suggests that if your Vision is as bold as we hope, about 20% of your team members won't buy in. That's fine. It's to be expected. 20% workforce turnover is common, in part due to a significant percentage of those people not seeing a place for themselves inside your Vision.

WHEN TO SHARE

Typically, you should share the Vision after you and the Senior Leadership Team are on the same page with your Vision and have an updated Org Chart.

We've built another session called the Foundation Setting Session that includes completing your initial Org Chart and introduces you and your team to our Meetings and Scorecard tools. To learn more, go to our 90u Library.

Next Up

Establishing your big-picture Vision aligns and focuses your entire organization all the way from your Compelling and Audacious Goals to everyone's day-to-day Roles and Responsibilities (R&Rs).

Now our hope is you'll begin to run your organization over an infinite expanse of 90-day sprints centered around your Vision. This journey is simpler when you're surrounded by people you love working with and trust.

We teach that trust comes in three forms — Character (displaying honesty and transparency), Competency (ability to perform R&Rs), and Connection (alignment with Core Values).

With a clear Vision in place, you'll have a solid foundation to make the process of building and operating your company a fulfilling experience.

As you leave the mountain and return to day-to-day operations, you'll begin to see how having the big-picture outline for your team members helps inspire their work. They'll get to see that every To-Do checked off, Issue resolved, and Rock completed keeps the company on track. When you've surrounded yourself with Ideal Team Members who genuinely enjoy the Work they're doing, you've provided purpose and meaning to their work life — something we should all be so lucky to have.

The way to keep this progress going is by having an intentional meeting cadence that keeps the organization focused, aligned, and thriving. The foundational piece of this cadence is the Weekly Team Meeting (WTM).

From small start-ups to the largest Fortune 500 companies, organizing function-specific teams improves productivity and streamlines operations. WTMs keep every team in the organization in constant, meaningful conversation. They provide an arena to get on the same page, stay accountable, and resolve the Issues standing in the way — they're the heartbeat that keeps the dreams of your Vision alive.

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Your Vision deserves to be more than a poster on the wall — it should be a rallying cry. Everyone in the company should know your Focus Filters and understand how they relate to their jobs. Through this understanding, people in the company can connect everyday execution to long-term strategy.

Jim Collins tells us in *Good to Great* that "Strategy is as much about saying *No* as it is about saying *Yes*." To apply this wisdom, we must have a framework to run decisions through that will allow us to be confident when we say Yes or No. Your Focus Filters provide a time-tested framework for Yes/No decisions like these:

- Do we even care about this opportunity? Does it align with our Purpose/Passion/Just Cause?

- Are we any good at it? Does it align with our Unique Value Proposition?

- Will it help attract and retain our Ideal Customers?

- Does it move us closer to achieving our CAG(s)?

- Is it consistent with, and supportive of, our 3-Year, 1-Year, and 90-Day Goals?

Using these five questions to evaluate opportunities will help you to say Yes to the right decisions and No to the rest.

When your leaders continually consider your Focus Filters during their planning, and team members keep them front-of-mind in their day-to-day work, you'll be amazed at what you can accomplish. Working toward your CAG(s), 3-Year, 1-Year, and 90-Day Goals drives innovation and success in a way that would not be possible otherwise.

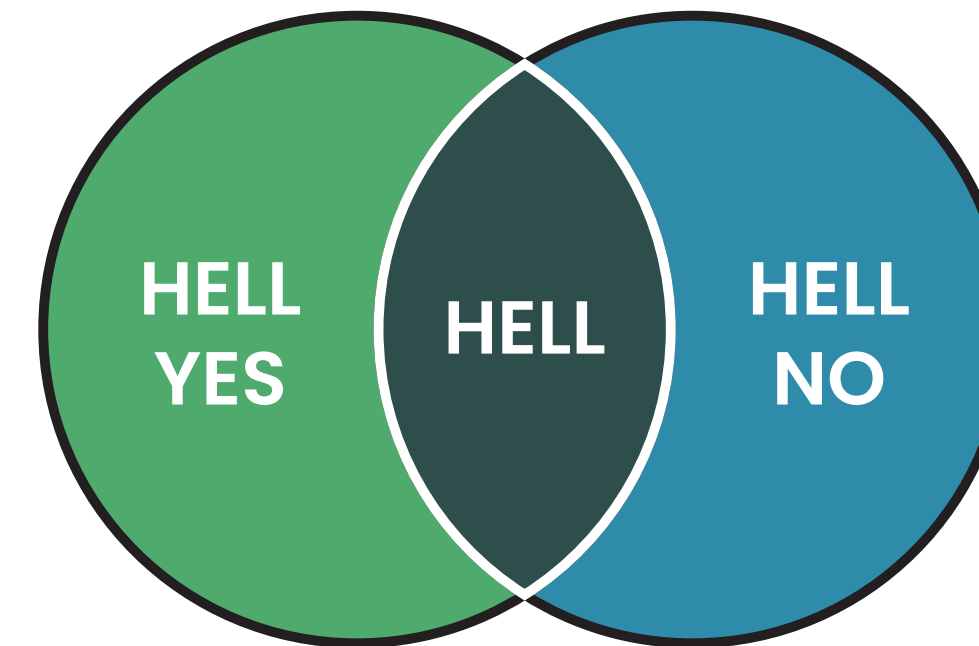This is a Venn diagram we like to share with our clients:

Figure 3.2 A hellish place for visionaries and their team members is found when there are decisions to be made without an enthusiastic "yes" or definitive "no" in sight.

When you're making decisions for the organization, your Focus Filters should lead you to a "hell yes" or "hell no" answer. Anything else is just hell.

KEEP SHARING YOUR VISION WITH EVERYONE IN YOUR COMPANY

Your company's Vision must always be available to your team members. Your Focus Filters will guide their decisions. With Ninety as your operating platform, you can easily memorialize and share your Focus Filters anytime with everyone in the company at no cost.*

Check your progress toward Rocks every week by running Weekly Team Meetings. At Quarterly Planning Meetings, department heads should check that their department's goals align with the company's Vision. If they don't, they need to rework plans to align.

Finally, take time to celebrate progress toward turning your Vision into reality. Recognize major milestones met along the way to help maintain momentum toward your ultimate goal — to build a great company that is extraordinarily focused, aligned, and thriving.

Access to Ninety is free to all the employees you put into your Org Chart. The only seats you pay for are those who are going to own Rocks and sit in meetings run on Ninety.

WE'RE JUST A SMALL OPERATION. DO WE REALLY NEED A VISION?

Yes. A Vision can help any business grow beyond its current state, no matter how small. A Vision becomes especially important when deciding which way to take the company or whether to pursue certain work.

WHEN IS A BUSINESS READY TO WORK ON ITS VISION?

Thinking about your Vision takes time and focus away from day-to-day work. If you can't afford to step away from daily tasks for a day or more, then schedule a series of four-hour sessions. You owe this to yourself, your leadership team, and ultimately all your stakeholders. Focus on developing your business to the point that you can take time away — perhaps by hiring more staff or developing more efficient processes. Keep dreaming about what you want your business to become, and bring those ideas with you when you're ready to clarify your Vision.

HOW CAN WE ENSURE OUR VISION IS MORE THAN JUST WORDS ON PAPER?

Making your Vision work for you has to be more than words on the company website. Review your Vision before planning sessions, and ensure every team member knows what it is and where to find it. Review your Focus Filters during all-hands meetings every quarter, and make company-wide announcements when you achieve milestones that move you closer to your now collective Vision.

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Appendix

We have a lot to offer to great company builders. This appendix includes information that we find incredibly helpful for building an extraordinarily focused, aligned, and thriving organization but may not be pertinent to establishing your initial Vision.

APPENDIX TABLE OF CONTENTS

Historically, what has been your process when you or someone on your team introduces a project or idea that you don't have the capacity for this quarter?

Most business leaders (and visionaries, in particular) have tons of ideas for new products, services, and strategies. They also see many things that could be better, stronger, faster, or simpler. Lots of these concepts are fantastic, but they need to be reserved for when resources can be allocated their way.

There's a place for all these things — the Long-Term Issues List. We know what it's like to let go of these, so we won't ask you to do that. Just move them to the Long-Term Issues List and make this the place where you and your colleagues store all the ideas that could turn into a Rock, 1-Year Goal, or 3-Year Goal.

Every 90 days or so, take the SLT off-site for a Quarterly Planning Meeting. Use this time to review how you did during the prior quarter and talk about what's working and whether anything has changed the clarity of your Vision. Refer to your Long-Term Issues List when thinking about the next set of 90-Day Rocks.

Likewise, review this list during Annual Planning Meetings when you're considering revising your 3-Year and 1-Year Goals.
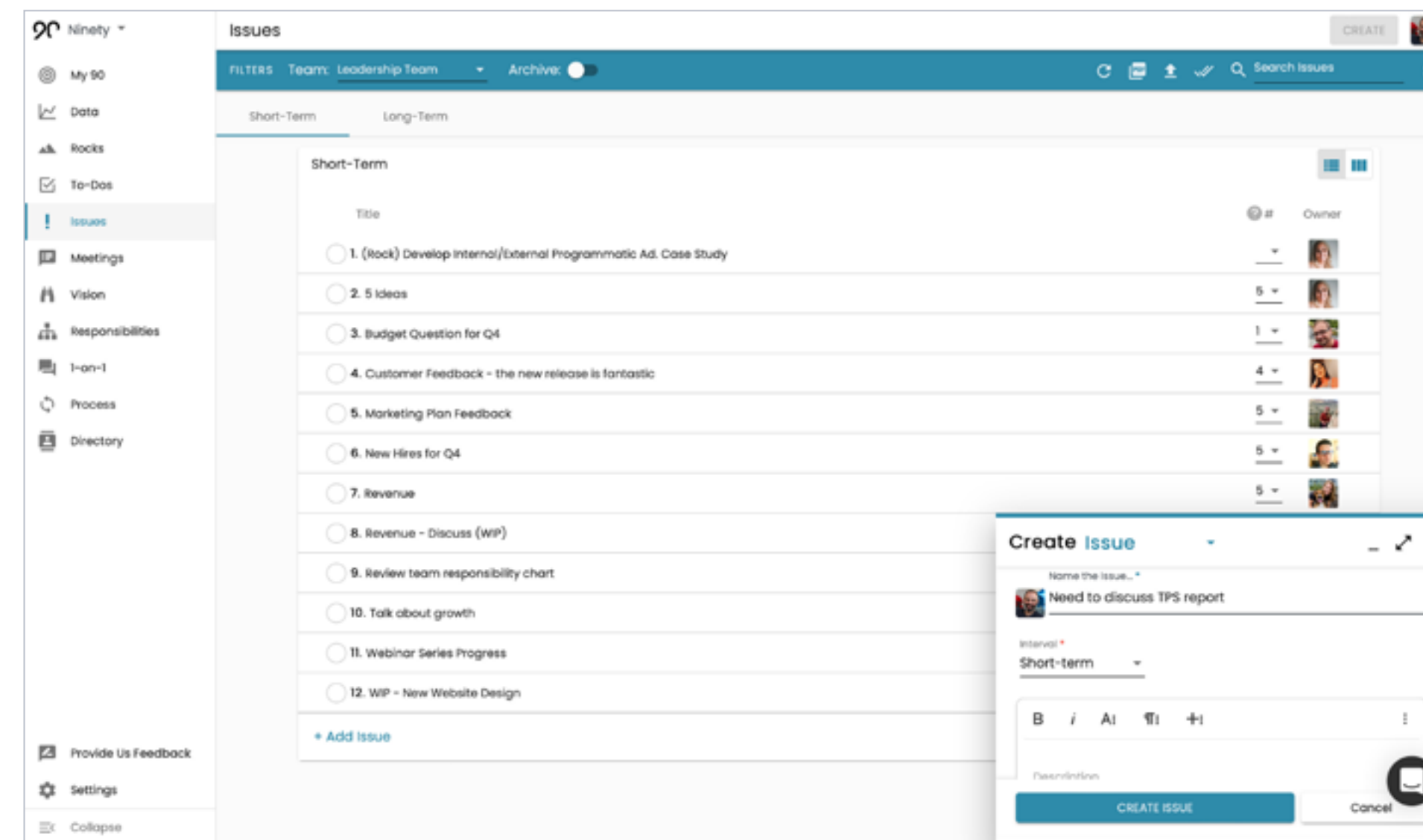

Figure 4.1 Ninety's Issues tool provides space for housing Long-Term Issues that must be solved each quarter.

As you progress through the workbook, write any Long-Term Issues here or in Ninety as an easy reference when you return to the office or meet with your SLT.

Life is long. Great companies play the long game. You're exactly where you're supposed to be.

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Identify obstacles preventing the free flow of information or ideas in your meetings or day-to-day operations.

There's always something we can do better. Our Short-Term Issues List contains items that we need to address this quarter. They tend to be things we can solve with a quick burst of action (a To-Do). The solutions should never be a new project — which we would move to a Long-Term Issue or potential 90-Day Goal — because we almost always have as much as we can handle on our plates for the quarter.

Issues impede us from completing Work. Maybe new software is needed, or there's a disruption in the production process or miscommunication between team members. The purpose of discussing problems should be to neatly Raise the core of the Issue to all parties involved, Discuss the potential solutions, then agree on how to Resolve the Issue — a process we call RDR.

Issues can also be about the flow of information. That flow can be in the form of information you need to spread to the group or a request for information from someone else. If a new initiative requires team buy-in, this is an excellent opportunity to present it and confirm everyone is on the same page.

There are two timeframes for Issues: short-term and long-term. We handle Short-Term Issues during our Weekly Team Meetings. Ideally, the team generates most of our Short-Term Issues outside the designated weekly meeting time as problems or opportunities arise.

We work through our Long-Term Issues during our Quarterly and Annual Planning Meetings. Issues discussed during planning meetings fall into two categories:

1. **Significant, more strategic, Issues that require a lengthy discussion.**

2. **Candidates for future 90-Day-Goals (Rocks).**

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As you progress through the workbook, write any Short-Term Issues here or in Ninety as an easy reference when you return to the office or meet with your SLT. These are the Issues you want to tackle in the next 90 days.

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Every company has obstacles. One of the key characteristics of great companies is actively acknowledging those obstacles and developing solutions.

How do you keep track of the number of deadlines your team is hitting?

To-Dos are tasks that we need to accomplish to win the week.

When you think about turning your Vision into reality, it's helpful to break things down into smaller, more easily digestible bites. We start by breaking down our CAGs into 3-Year Goals, then 1-Year Goals, then 90-Day Goals, then Milestones, and finally, when the time arrives, into To-Dos.

CONTEXT AROUND TO-DOS

Stephen Covey, educator and author, encourages us to imagine an empty jar as a metaphor for allocating our time.

Covey asks us to think about what we want and what actions are needed to achieve it. These actions lay the groundwork for creating goals (Covey calls them Rocks). We can then break the goals into smaller pieces (Covey calls them pebbles — we call them Milestones). **First, the Rocks and then the pebbles get dropped into our metaphorical empty jar.**

In this metaphor, To-Dos are sand, and our day-to-day work (roles, accountabilities, and responsibilities) is water. **The sand and then the water go in next, filling the space around the Rocks and pebbles.**

If we reversed this process, we would be unable to get our Rocks fully into the jar — into our allotted time.

When assigned, To-Dos have a built-in shelf life of seven to fourteen days, but we don't set that in stone. It's not uncommon to push out the date because life happens. The danger comes when pushing the date becomes a habit.

If To-Dos are becoming burdensome to complete within a week, talk about what is standing in the way. These conversations come in the form of Issues during the Weekly Team Meeting.
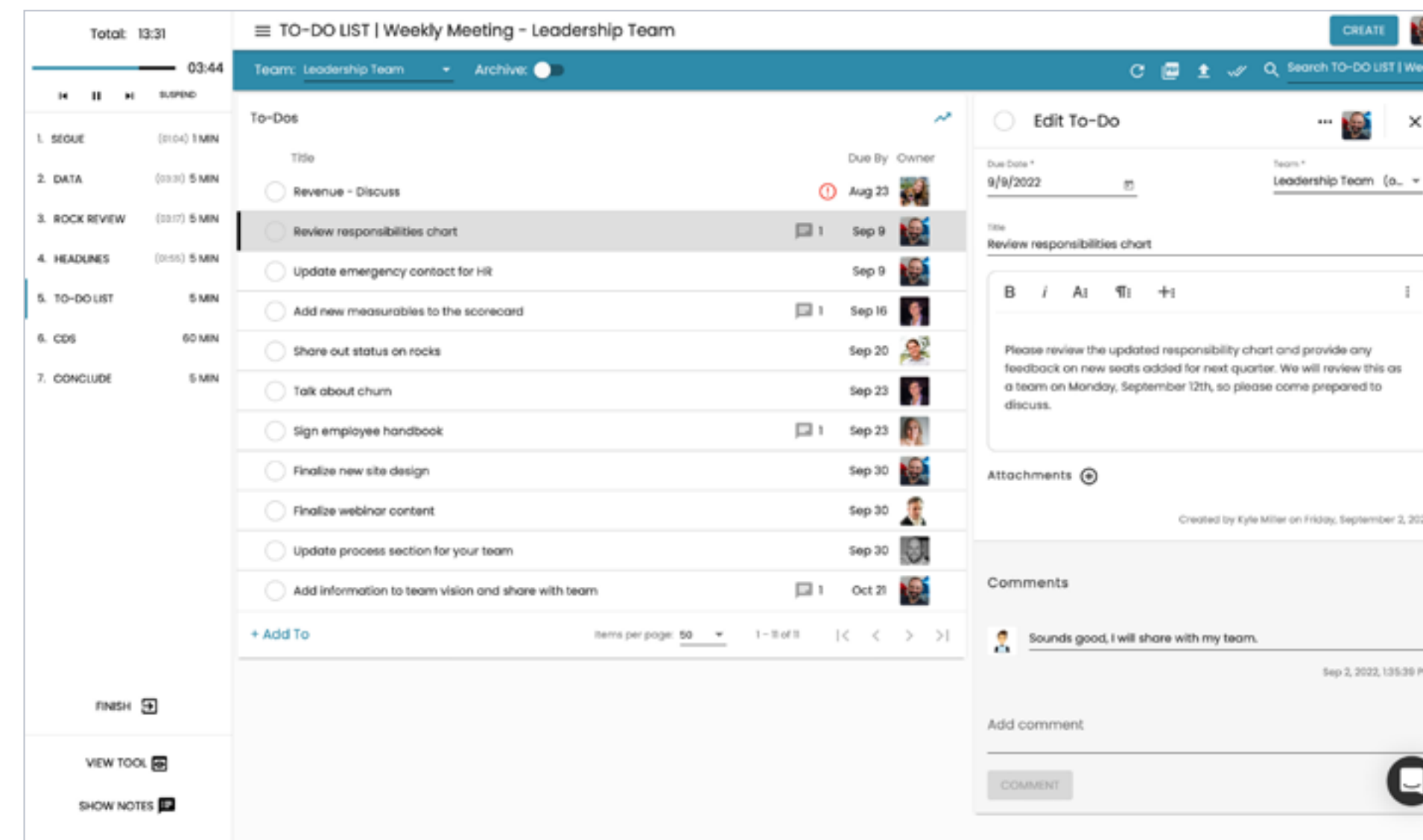
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Figure 4.2 Ninety's To-Dos tool offers intuitive task management capabilities to assign owners to items, track deadlines, and communicate across teams.

As you progress through the workbook, write any immediate To-Dos here or in Ninety.

To-Dos are agreements. They're the end of almost every great work effort — a goal, a Rock, or a commitment to help someone out.

MAKE YOUR WORK SPECIFIC, METHODICAL, AND CONSISTENT

Creating a well-defined Vision is essential, but accomplishing great things takes more than just a Vision statement. At Ninety, we also use a SMaC™ (Specific, Methodical, and Consistent), a concept introduced by Jim Collins in his book *Great by Choice* that helps turn ideas into action.

A SMaC Recipe™ is a set of durable guiding principles that create a replicable formula for success. In *Great by Choice*, Collins wrote about how Howard Putnam, the CEO of Southwest Airlines, didn't issue some bland, generic "Southwest Airlines will be a leading low-cost airline" statement. In 1979, he enumerated ten guiding principles for running Southwest:

1. Remain an airline for short distances.

2. Use the Boeing 737 as the primary plane for 10-12 years.

3. Ensure higher occupancy of the aircraft.

4. The passenger is the number one product — no airfreight or mail.

5. Continue to charge low rates and offer high service.

6. No catering companies.

7. No reselling of tickets.

8. Keep Texas as the priority.

9. Retain the family feeling in the services and create a fun atmosphere.

10. Keep it simple.

Putnam's ten points are easy to grasp, explain, understand, and adhere to. They reflect insight based upon empirical validation about what works. Put simply, there are a lot of things that are out of your control — focus your effort on the factors you can control and do them well.

Take the idea of only flying 737s. Every Southwest pilot could operate every one of the company's jets — simplifying scheduling. One type of jet made buying, storing, and grabbing parts almost easy. Writing training manuals and aircraft maintenance procedures, as well as boarding the plane, became exponentially easier. Better yet, Putnam's list stood the test of time. In total, Southwest changed the list by less than 20% during its first quarter of a century, a period of immense change in the commercial aviation industry (fuel shocks, air traffic control strikes, massive mergers, the rise of the hub-and-spoke network model, recessions, interest rate spikes, the internet, and 9/11).

> **OPERATING IN A TURBULENT WORLD WITHOUT A SMAC RECIPE IS LIKE BEING LOST IN THE WILDERNESS IN THE MIDDLE OF A STORM WITHOUT A COMPASS.**
>
> *GREAT BY CHOICE*
> **JAMES C. COLLINS AND MORTEN T. HANSEN**

Please note that not all companies see the need for a SMaC. Ninety has one and relies on it. If you think it could be of value, here's the methodology that Collins shares at the end of *Great by Choice*:

1. Make a list of the successes your enterprise has achieved.

2. Make a list of the disappointments your enterprise has experienced.

3. What specific practices correlate with the successes but not the disappointments?

4. What specific practices correlate with the disappointments but not the successes?

5. Which of these practices can last perhaps 10 to 30 years and apply across a wide range of circumstances?

6. Why do the specific practices work?

Based on the above, identify several guiding principles that make your work processes Specific, Methodical, and Consistent.

Make the list practical, empirical, specific, and concrete.

SWOT Analysis

A **SWOT analysis** aims to assist planning by developing a strategic framework based on your assessment of your company's Strengths, Weaknesses, Opportunities, and Threats.

Your Focus Filters should be the anchors for all your strategic planning processes. Once the Senior Leadership Team agrees on those larger objectives, the SWOT helps organize our thoughts on the internal and external factors affecting our company's ability to accomplish them.

A SWOT analysis starts by looking inward and determining our company's internal strengths and weaknesses. These are the resources and capabilities that provide us with a competitive advantage.

Strengths are the things that provide value to our company or that we do better than the competition. Is our customer support the best in the business? That's a strength. Are we a low-cost leader? Strength. Does our product perform better than our competitors'? Strength.

Weaknesses are the aspects of our company that reduce value and make it harder for us to reach our goals. Production running behind? That would be a weakness. Poor user reviews online? Another weakness.

After this internal review, we start looking at external factors by considering opportunities and threats.

Opportunities are areas of potential expansion or growth. Is there a new industry or product line that appears attractive? Are we considering an acquisition that expands our footprint? Both would be clear examples of opportunities.

Threats are external factors that can negatively impact our company or our ability to create value. Examples would include tighter government regulations or tariffs or a new competitor in the marketplace.

Strengths and opportunities are the more offensive plays — the strategies and tactics that are more aggressive and push the needle up.

Weaknesses and threats are more defensive — protecting our gains is the name of the game when it comes to conversations about these items, and when appropriate, we assess where we may need to be defensive.

If you're off in the mountains right now, filling out the SWOT will provide you with discussion topics for when you get back with your team. If you're putting everything into Ninety, you can convert each SWOT element into a Long-Term Issue with the click of a button. From there, it can become a Rock candidate for the next quarter or a topic of discussion at your next Quarterly or Annual Planning Meeting.

CORE DISCIPLINES OF A GREAT SWOT

1. **Don't rest on your laurels.** Strengths need to be considered as potential Issues, just as weaknesses are. Ask, "How can we do this better?" or "How can we lean on this more?"

2. **Strengths aren't always positive, just as weaknesses aren't always negative.** If your company is a low-cost leader (strength) but fighting for margin, there's a discussion to be had. Weaknesses could be an intentional byproduct of a strength or from capitalizing on an opportunity. A team might have difficulty growing revenue (weakness) because their goal is to pursue business in an entirely new sector.

3. **Don't worry about prioritizing each section** — it's more important to establish a wide-angle view of the entire strategic situation than it is to zoom in on any particular area.

The overall purpose of a SWOT is to assist in developing and assessing strategy. Careful analysis of internal and external factors and how they interact reveals the strategic fit of the company. Understanding strategic fit allows our team to create a more comprehensive plan for turning the Vision into reality.

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Based on the above, identify some guiding principles for your company in each section of the SWOT analysis.

Strengths

Weaknesses

Opportunities

Threats

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"Building Your Company's Vision"
Harvard Business Review
By Jim Collins and Jerry I. Porras

Built to Last: Successful Habits of Visionary Companies
By Jim Collins and Jerry I. Porras

Good to Great: Why Some Companies Make the Leap...and Others Don't
By Jim Collins

Great by Choice: Uncertainty, Chaos, and Luck — Why Some Thrive Despite Them All
By Jim Collins and Morten T. Hansen

The Advantage: Why Organizational Health Trumps Everything Else in Business
By Patrick Lencioni

Start with Why: How Great Leaders Inspire Everyone to Take Action
By Simon Sinek

Vivid Vision: A Remarkable Tool for Aligning Your Business Around a Shared Vision of the Future
By Cameron Herold

The Patient Organization: Attracting, Engaging, and Empowering Team Players
By Walt Brown

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Appendix

FINAL THOUGHTS FROM NINETY

Thank you for trusting us on your journey toward building a great company. Now that you have a sense of how these concepts and their related tools advance a company's Vision, you may be eager to implement them in your own organization. We're here to help! Find more company-building information in the 90u Library or try Ninety today.