

PART 1

# PLANNING



The *Planning* section is a concentrated version of what you need to do to create and write down your plans and goals for the coming year. It is divided into two parts: *Business Planning* and *Personal Planning*.

The format we are introducing has been used with literally thousands of businesses since Robert's days at Warwick Business School. We use it because it works. It is simple. It focuses on key issues. It is in plain language and free of jargon. People who use it grasp the idea very quickly, apply it to their business and see buy-in and results.

This material has been used with everyone from peer-to-peer groups to boards of directors. It has been the centre-piece of everything from five-day board retreats to 40-minute immersives.

The following pages cover the key elements used with business directors to define and clarify their business and personal futures. We have gone straight to the heart of the matter and avoided using anything we do not feel is absolutely necessary.

### **Please note, it looks deceptively simple!**

The power is in the process of actually working through the worksheets. The power is in simplifying things and focusing on what really matters. This can be done in an hour or so or can become part of a company-wide, full-blown business planning exercise. The choice is yours. Choose what works for you.

### **How most people use the Journal**

Most people choose to run through the *planning* worksheets on their own. The worksheets give a different slant on how they may already be doing business planning in their own business. Because of its focus on simplifying and focusing, it helps to clarify more complex planning systems. It highlights key tasks for the individual.

“ I got the most value out of the planner section by going through it on my own. A quiet room, a large jug of coffee or two, a calculator and lots of post-its. It helped me crystallise exactly what I was trying to achieve and what steps I needed to take. ”

—Jamie Collins, CEO

“ The planning section really helped me to clarify exactly what I was trying to do both in the business and, funnily enough, in my private life. We now use the business planning tools throughout the business. To be honest, we had been playing at planning before. The Journal brings simplicity and focus to the business. As a consequence we feel more in control and we are hitting our targets like never before! ”

—Jodie Patterson, Managing Director

“ Having looked at some of the exercises, we realised that the board would get even more benefit if we pulled in an external facilitator to walk us through the exercise. That way we could concentrate on the thinking as someone else ran the session. ”

—Jessica Nelson, CEO



## Using the Journal

Wherever you see an exercise in the Journal, please be aware that the instructions are only a guide to how the tool can be used. Some of these exercises can be rolled out over an entire day so you can dig deeper and probe to get more understanding. The self-same exercises can often be completed in a matter of 10 minutes. Clearly the impact varies with the effort you put in and how engaged you are in the process.

To be clear, we recommend that most of the exercises be completed in 10–20 minutes. We are all busy and often we “get” the message or we “get” the point quite quickly. If, however, you come across an exercise that you want to explore further, then feel free to do so.

We, as authors, don’t like overly prescriptive processes that squeeze the creativity out of an exercise; we imagine that you feel the same. Included in the *planning* part of the Journal are our preferred versions of models. That is because we do not believe that there is ONE universal perfect model and think that different versions have different purposes.

What most readers do is run through most of the exercises in an afternoon. Yes, this may seem a little superficial, but it gives people a sense of the whole and a sense of the individual parts. Then, at their own leisure, people return to the exercises that they feel they should work on some more.

If you have a coach or a buddy, challenging and being challenged allows you to think of things that you wouldn’t normally think of. These exercises work in a similar fashion.

The website [www.checkinjournal.com](http://www.checkinjournal.com) has video instructions for each exercise.

## What we’ll cover:

- Mindset
- Wheel of Life
- Logic
- Strategy
- Where are you now? How good is your business?
- Where do you want to be?
- The Cascade exercise – mapping out the destination
- The Wallpaper exercise – mapping out the journey
- Annual Business Plan
- Probably Your Best Year Yet
- Annual Personal Plan.

To find out more about how other businesses use the Check-in planning tools, visit [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub).

## **Mindset: The one thing that determines everything else**

No amount of the right tools, systems, processes and strategies will work if you or your team have the wrong mindset.

Too many business owners and directors do not have the right mindset. They spend too much time meddling, working *in* the business rather than working *on* the business. They get preoccupied with petty debates with staff or clients. Often we just don't think big enough.

Running through this Journal is the notion that we need to get our mindset in order. And fast.

The Check-In Journal links the planning and the execution.

“ If I had eight hours to chop down a tree, I'd spend six hours sharpening my axe. ”

—Abraham Lincoln

Next, we will start the planning exercises with the Wheel of Life exercise. It may sound a little touchy-feely but it is a great starting point that combines both business and personal aspects of your life.

## Wheel of Life exercise: The big picture for business and personal growth

The first exercise, the Wheel of Life, is a big picture check-in to evaluate both your business and personal success. It is the start of our Part One exercises.

### Why use the Wheel of Life?

This version is particularly powerful at getting you to address just how well you are performing in key aspects of your life. It identifies weaknesses and where you need to focus your energies.

### What is it?

This is a “*where am I now?*” type exercise that you may have seen before. It looks at how well you are performing in such areas as family, career and fun. It is a snapshot “*how do I score myself right now?*” tool.

### How to use it?

We recommend a minimum of 20 minutes to score yourself (see below).

Next, reflect on your scores on your own – or you may prefer to share and discuss the scores with your partner. This can take a long time (hours rather than minutes) but is worth the time investment.

## Wheel of Life instructions

For each axis on the chart, mark a score between 0 and 10, where 0 is a low score and 10 is a high score.

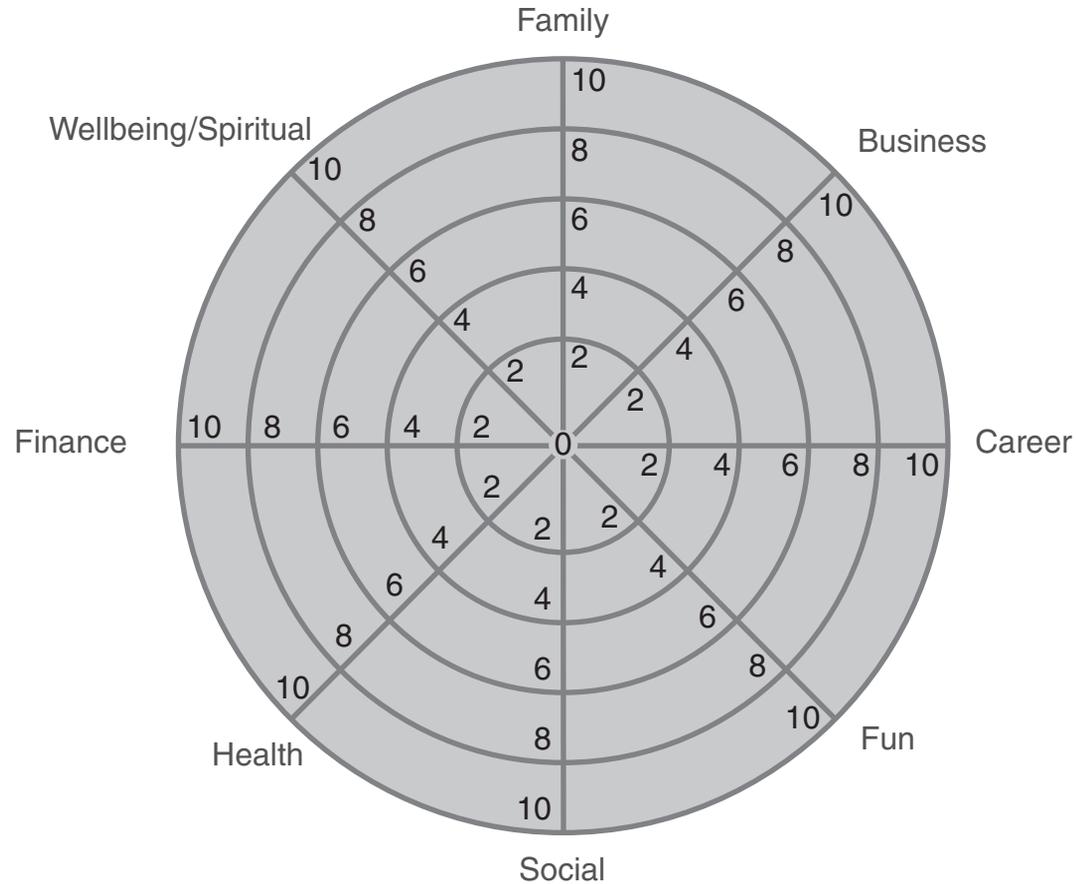
Score where you are today and join the marks to create a kind of a circular shape.

People often ask, “What is a 7?” It’s subjective and for you to score. Some people never score a 10 as it’s “perfect”. Whatever your scale is, it is your scale and the important thing to consider is what would +1 (one more) look like and why? And what would –1 (one less) look like and why?

The ability to stop, stand still and reflect is important. You need to understand where you have come from and where you are in order to understand where you want to go.

## Other possible questions

- “Is it 7 and improving, 7 and getting worse, or just stuck at 7?”
- “Why haven’t you given yourself 8 or 6?”
- “What would you need to do to improve the score?”
- “How can you justify your scores? Where is the evidence?”
- “Are you really sure that you are measuring appropriately?”



### How do you score your Wheel of Life?

When asked to score yourself, it is worth asking:

- "How would I score myself on this aspect?"
- "What's worked/working?"
- "What's not worked/working?"

### Where would you like to be?

Next, score where you would like the different aspects to be in, say, 12 months' time. Do this in a different colour.

Now, the questions to reflect on are:

- "How do I get from where I am now to where I want to be?"
- "What do I need to do more of, less of, stop doing, start doing and keep doing?"

# Business Planning

## A sense of logic: Working through the plan in a specific order

We spend too much time working *in* the business, dealing with the detail of keeping the business going. We do not spend enough time *on* the business: designing, planning and mapping out the future.

And when we do try to start working *on* the business, we usually start in the wrong place, simply reacting to the latest crisis – be it people, customers, growth or cash.

## Working from the big picture down

Stepping back from the business makes us realise that we can be busy fools, madly chasing our tails but not sure if we are being busy at what is really important. Not sure if we even know what is really important. How do we find out?

There is a logical hierarchy for planning a business, to regain a sense of sanity in the proceedings.

There is an attractive simplicity in starting at the top with the big picture and creating the detail in the following order:

- 1) Strategy: Business strategy and planning
  - “Where are we going?”
- 2) Marketing: Winning business – sales and marketing
  - “How will we sell this stuff?”
- 3) Operations: Managing operations
  - “How will we make this happen?”
- 4) People and culture: Teams and relationships
  - “How will we work together to make this happen?”

## A big BUT...

The *people and culture* piece is NOT fourth in importance; it is the fundamental foundation that underpins and runs through every other aspect of the business. It is the DNA!

## Time for some definitions

### Strategy

“planning while being aware of the outside environment”

### Marketing

“why and how... we get which people... to buy what from us...”

### Operations

“doing the doing”: systems, and processes to deliver our product/service

### People and Culture

“the backbone of the business”.

## Strategy: The first building block of the plan

Strategy at its simplest is asking: “Where are you going (while being aware of the outside environment)?”

The case for putting strategy at the head of the planning hierarchy is simple. In the real world,

“ If you don’t know where you’re going then any road will do. ”

—Cheshire Cat, *Alice’s Adventures in Wonderland*

Often, people attend badly run “Strategy Away-days” which create plans they rarely deliver on. The plans have little to do with the day to day running of their business. But it doesn’t have to be that way.

### The Cascade: A strategy/planning exercise that works

The Cascade is a simple yet powerful way to set up your business for the coming year(s). It comprises three apparently simple questions:

- “Where are you now?”
- “Where are you going?”
- “How are you going to get there?”

An additional question would be:

- “How are you going to measure and monitor your performance to make sure you stay on track (or take the necessary evasive action)?”

It creates the context for what you are doing this quarter, this month, this week... today.

### The question the team asks

So, how do you answer the question that every member of your team is bound to ask at some point:

*“What is our strategy?”*

The essence, the heart, of the strategy needs to be articulated in a short, succinct statement. One that everyone can understand.

### So, what is your business’s strategy?

For us, a strategy is composed of three elements:

#### Objective

A single precise statement that will drive the business over the next three years.

#### Scope

The customer or service offering, location and position in the market.

#### Advantage

Sustainable competitive advantage (in other words, “*being different from or better than the rest and being able to maintain that position*”) is the essence of strategy. It comprises:

- your customer value proposition
- your unique activities.

You do need to write this down, but we are going to ask you to hang fire because the first piece in the strategy and planning jigsaw is to agree “*Where are you now?*” and “*How good is your business?*”

## The Business Audit: Evaluating current performance

Having considered the big picture of the Wheel of Life, this exercise asks you to evaluate your current business performance. It's the start of looking at your business with the goal of being able to create a meaningful business plan you can monitor in your Journal.

### Why use the "Where are you now?" Business Audit framework?

This apparently simple tool (also known as FiMO-PC) gives a clear indication of how good your business is and what needs to be worked on. It is a great springboard for lively conversation and debate (for instance, *"are we a 6 or a 7 and why?"*). It is a starting point for all future conversations about business performance when you ask, *"What are the scores on the doors?"*

### What is it?

FiMO-PC is a *"where am I now?"* type exercise. It looks at how well your business is performing in finance, marketing, operations and people and culture. It is a snapshot *"how do I score myself right now?"* tool.

### How to use it?

We recommend a minimum of 20 minutes to score yourself (see below).

Next, reflect on your scores – or you may prefer to share and discuss the scores with your business partner or your business team.

### Tips

Keep asking the crunch questions:

- "What's worked/working?"
- "What's not worked/working?"
- "How do I get from where I am now to where I want to be?"
- "What do I need to do more of, less of, stop doing, start doing and keep doing?"

“ The FiMO-PC exercise brought home to us exactly what we needed to do. In reality, we (as a team) already knew, but only when it was presented with such simplicity and clarity did the penny drop about the blindingly obvious of what we needed to do to sort out the business. And just in time! ”

—Andrea Higgins, Marketing Director

In order to answer the question, “*How good is your business?*”, we use a framework referred to by the acronym FiMO-PC – Finance, Marketing and Operations underpinned by People and Culture.

FiMO-PC is a framework that can be used to evaluate the strengths and weaknesses of your business and to open up discussion to agree the “state of play”.

Before you can look at future plans – your route map – you need to know how the business is performing right now.

### Measuring business performance to date

When asked, “*What measures should be used to assess your company’s performance to date?*” the same list of financials is usually put forward, give or take one or two differences (turnover, profit, cash, growth, etc.).

While these financial measures are commendable, to some degree they miss the point. What really matters is far more than just the financials.

While we don’t dispute the importance of finance – it is poor financial performance that will make you go bust – you need to recognise that:

“ Finance is simply a consequence of two other factors, marketing and operations... (and making those ingredients work depends on your people and culture working properly!) ”

–Robert

### So what?

To sort your *financial* performance, you probably need to sort your *marketing* and/or *operations* performance.

### What do we mean by *marketing* and *operations*?

*Marketing* is all about finding prospects and selling to them. There are as many measures of *marketing* as there are measures of *finance*.

*Operations* is all about producing the service or product. It is all about the “doing”. There are as many measures of *operations* as there are of *finance*.

### Please note

The list under each box is just an indication of the sort of generic measures that a typical business might use.

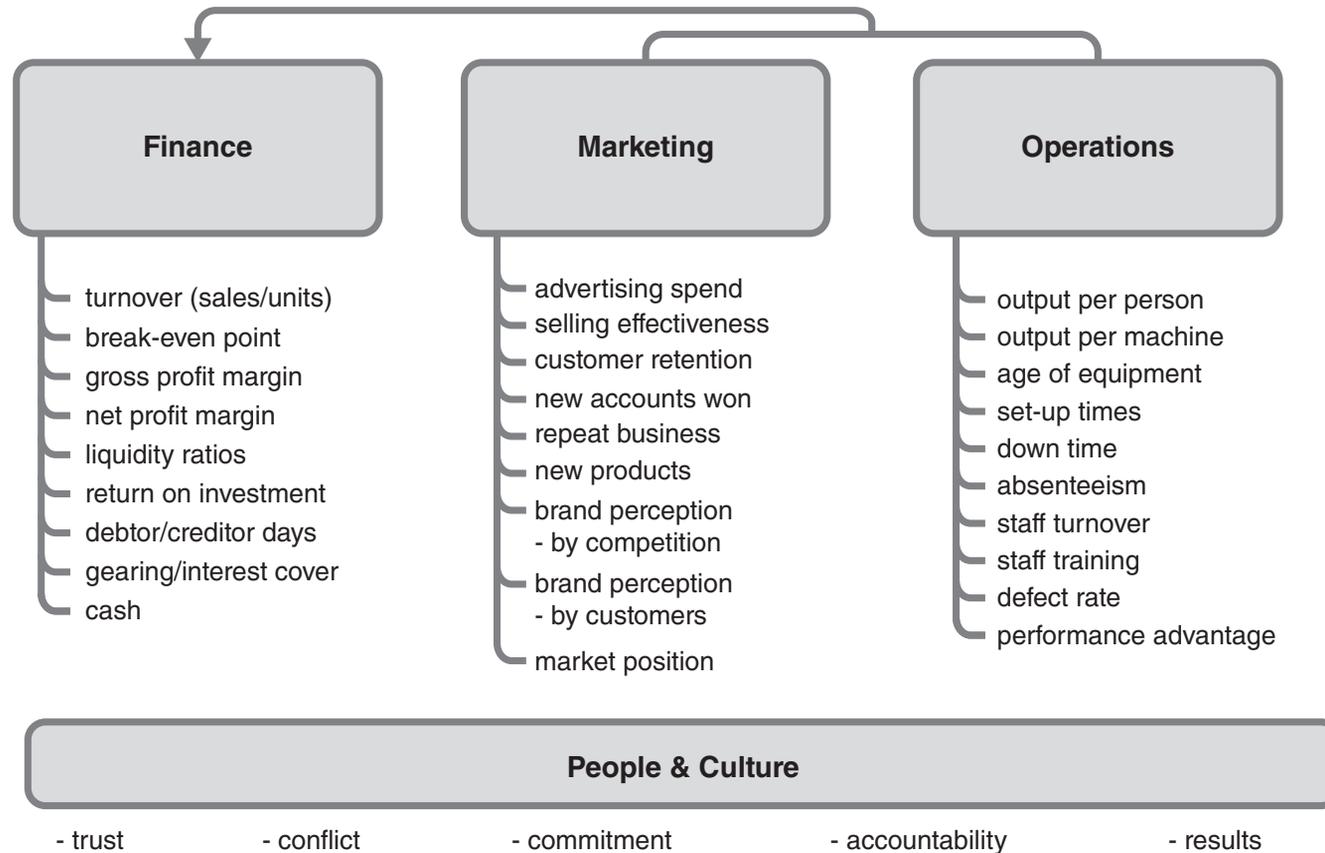
### So, how good is your business?

How would we measure your business performance to date? What measures would we use to evaluate how good your business is?

## FiMO-PC exercise: Measuring performance to date

Score your business, now. Take 20–30 minutes.

Take each of the four main headings in the table below and give your business a score out of 10 for your performance (where 0 is a very low score and 10 is a very high score).



How do the scores work?

Scores of 2 or 3 suggest that there is something seriously wrong

Scores of 4 or 5 or 6 suggest mediocrity

Scores of 8 or 9 suggest that you are pretty good if not heading towards “world class”.

For more detail on FiMO-PC scoring, go to [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub).

## Action

So, here goes... mark your scores out of 10. Remember that this scoring system is subjective; it should be your gut response. By definition, this process is a little ambiguous and that is because we are interested in the process, the discussion about what the scores mean and how they can be improved. As soon as you enter a number, you (or your colleagues) can argue why the score given was either too high or too low.

## Learning point

When scoring their own business, most people score something like this

*Finance*: 6

*Marketing*: 4

*Operations*: 8

*People and Culture*: 6

– i.e., *financial* performance is OK, *marketing* is pretty poor and we feel that we are pretty good at the *operations*, the doing. Meanwhile, *people and culture* is simply alright.

Please note:

- *Finance* is normally an average of *marketing* and *operations*.
- *People and culture* is both a consequence of, and cause of, *marketing* and *operations* performance! More on that later!

## Key point

Recognise that we have four interlocking and overlapping functions, co-existing and interdependent. The image to be held in mind is that of a juggler – when all the balls move smoothly there are no problems, but if one ball starts to wobble then chaos often ensues.

## Three morals here

First, to establish your journey, and direction, you need to know your “performance to date” (“*where are we now?*”).

Second, in order to improve your *financial* performance, it appears that you must first sort your *marketing* performance. However, we would actually say that first you need to check that your financial model is effective. There is no point growing sales if you are only making 1p in the £; first, sort your financial model so you make 10p in the £, then you should increase sales and marketing activity.

Third, none of the above mean anything if your *people and culture* piece is not working properly.

## The Three-by-Three Strategy Matrix exercise: Three-year goals

While the previous exercise creates the starting point, “*where are you now?*”, this next exercise looks at where you want to go. You will incorporate much of the thinking from this activity into later exercises, as well as use it as a beacon or a guide in your day-by-day, week-by-week use of the Journal.

### Why use the Three-by-Three Strategy Matrix?

The tool asks the question, “*Where do I want to be in three years?*”. It shows the trade-offs between business, career and personal goals. Also, it challenges your rate of growth/development.

### What is it?

Three by Three is a “*Where am I going? How am I going to get there?*” exercise. It looks at where you want to be in three years, and in one year, and asks, “*What do you need to do now?*”. It looks at three distinct but interlocking aspects: your business, your career and your private life.

### How to use it?

We recommend a minimum of 15 minutes to score yourself (see below). People who have been through similar exercises can often complete the initial run through in about 10. Next, reflect on what you have written. Finally, share and discuss the exercise with your partner if you feel comfortable doing that.

## Instructions

Start writing in the boxes in the order you feel most comfortable. Ideally you will enter four to five bullet points in each box. Make the statements simple and try to put

numbers in – or concrete things where possible. So, write “house worth £3m” rather than “big house”, or “four-week African safari trip” rather than “big holiday”. Make it real. Take, say, 15 minutes to fill in the matrix.

Ask yourself:

- “Where do I want the business to be in three years’ time?”
- “So, where do I want the business to be in one year’s time?”
- “So, what do I need to do now?”

And in turn:

- “Where do I want my professional life to be in three years’ time?” “So, where do I want my professional life to be in one year’s time?” “So, what do I need to do now?”
- “Where do I want my private life to be in three years’ time?” “So, where do I want my private life to be in one year’s time?” “So, what do I need to do now?”

## Start with the end in mind

A large part of the strategy piece is debating and discussing where you want the business to be (and why).

Planning from where you are today is almost impossible... so many immediate things that need to be dealt with... so many small things that just aren’t quite right.

However, if you start with the end in mind then it is much easier to map out the journey and the steps along the way.

Clarity about direction and trajectory is crucial. At the same time, you do need to work through the exercise, if only to make your mistakes on paper. If you are able to, you should spend at least a day a year stepping back and looking at where you want to be in three years’ time.

### Three-by-Three Matrix

| FOR                                     | THE BUSINESS | MY CAREER | MY PRIVATE LIFE |
|-----------------------------------------|--------------|-----------|-----------------|
| Where do you want to be in THREE years? |              |           |                 |
| Where do you want to be in ONE year?    |              |           |                 |
| What do you need to do NOW?             |              |           |                 |



Three By Three was a big 'aha' for me. I needed to prioritise, now I have my life back! ”

—Cara Malone, Director

## The Cascade exercise: Mapping the journey from vision to KPIs

Many consider the Cascade to be the meat of the business exercises. First you needed to understand “*where are you now?*” and consider where you wanted to be in the big picture format. Only then can you start to fill in the detail. It is this detail that you will be reflecting on in your weekly, monthly and quarterly progress in the Journal.

### Why use the Cascade exercise?

Working through the process, top-down, creates a logical step-by-step process to underpin the what, why, when, where, who and how (WWWWWH) of all your business activities. It explains and justifies your business. It enables you to explain to yourself, your people and your customers exactly what you do and why. It makes sure there is a good fit and alignment between the higher and lower levels of your strategies and tactics.

### What is it?

This is a “fill-in-the-boxes” exercise. The Cascade is a simple set of principles/ideas that interlink, starting with *purpose* then *vision*, *mission*, *strategy*, *milestones* and finishing with *key performance indicators*.

### How to use it?

Starting at *Level 0 – Purpose*, work your way down the list taking up to, say, four lines to fill in each box. Each box is ‘fed’ by the previous box, e.g. if you deliver on your *Level 1 – Vision* then you should deliver on your *Level 0 – Purpose*.

To develop a working model of where you want to be requires creating a *Cascade* which helps you to clarify and define where you want to be. The value is in the thinking and discussion and not just the writing of the words.

It is a one-page exercise.

Do not get caught up in the various definitions of “*objectives*”, “*purpose*”, “*vision*”... everyone defines them differently. That’s why we refer to them as Level 1, etc. It is the thinking that matters. Just accept our definitions or replace them with your own names.

## The Cascade approach

We have worked with literally hundreds of boards. Robert's business specialises in delivering a boardroom process that consistently delivers actionable plans. We have honed down the strategy and planning process to several basics in a "strategy on a page" approach because, if you get the core fundamentals agreed and addressed, then everything else can come from that.

### Values – part of your purpose

The piece that often gets businesses confused is the purpose part of the Cascade process. Many think that "purpose" is all about ethereal airy-fairy stuff of little relevance to a business. For some that may be true. However, time and time again, we see that a business without clarity about its values is like a ship sailing without a compass. The values tell you (and your people) what you stand for and what you believe in. Remove them and anything goes, which is a bad thing (unless of course that is your value statement!). So, top of the tree, top of the list to address, the thing that informs everything else, has to be your values.

## Instructions

If you have recently gone through an effective strategy and business planning process, then you might be able to fill in the following worksheets in 10 minutes. It will be an interesting test to discover how much you remember or have bought into the various parts of the process.

Most people can work through the sheets in, say, an hour or so.

To give you an idea, we run half-day Cascade workshops where the majority of the sheets are thought through, worked through and filled in as first drafts.

Another option is to run a series of one- and two-hour workshops with your team (or by yourself!) where you reflect and consider your answers before you fill them in.

Our experience is that the first attempt at the exercise is often fairly accurate (although this is not the case when the business is facing extreme or especially challenging situations).

Start at *Level 0: Purpose* and slowly work your way through the sheets, reading the introduction to each part.

Numerous examples of full Cascades are available at the website [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub).

## Level 0: Purpose

“ Working on our Purpose for the first time made us realise that we had never really discussed and debated what our core values really were. Quite terrifying. After some debate we felt much closer and more united about what was and was not acceptable. ”

—Terry Walsh, Director

What are your values, purpose and niche? What is your reason for doing what you do? What is your “Why?” Why do you exist? What is your BHAG (Big Hairy Audacious Goal)? A BHAG is your ludicrously ambitious goal for, say, 10 years’ time.

## Your Purpose Questions

What are your values?

What is your purpose/cause/passion? Why do you do what you do?

What is the niche that you set out to serve?

What is your BHAG (Big Hairy Audacious Goal)?

## Levels 1 & 2: Vision and Mission

“ Despite being handed the usual 75-page corporate business plan, our business unit had never addressed how the disconnected targets we were given could make sense. Going back to basics and discovering our vision and mission (which fitted the corporate master plan) was a revelation. Finally our ducks were in a row! ”

—Jerry Cottle, UK Director

Fill in Level 1: Vision. What is your “blue skies” vision for the business? What does success look like in, say, three years? This is not about hard numbers but about what you want to be – e.g. to be known as, to be in the top three of, to be recognised as...

Then fill in Level 2: Mission. What are the numbers you want to hit (to achieve the vision) in, say, three years? For example, turnover, net profit, staff numbers, average transaction value, number of products, what you want to be.

## Your Vision and Mission

**Level 1: Vision.** What do you want to be known for? What do you want to be famous for?

**Level 2: Mission.** What numbers do you want to hit in three years' time?

What will the business look and feel like when you hit these goals?

### Level 3: Strategy

“ We’d found the purpose, vision and mission discussions fascinating. Suddenly the strategy, how we were going to actually deliver on the numbers (the mission), needed to be articulated simply and succinctly. We struggled over this at first, but the resulting clarity of thinking meant we had something we could share with all the teams. Suddenly everyone understood what we were doing (and why). Amazing. ”

—Simon Woodcock, Founder-Director

## Strategy

How we are going to do it: e.g. competing on price, competing on quality, best customer service, buying other businesses, hiring the best...

**Level 3: Strategy.** How are you going to make it happen?

## Levels 4 & 5: Milestones and Key Performance Indicators

“ I fancied myself as a bit of an expert at business planning, but the Check-in Journal process meant that itemising key milestones ahead became relatively easy. This time the right KPIs were generated – measuring the right stuff to achieve the milestones. Quick and simple. ”

–Toni Hancock, Managing Director

Level 4 is milestones or core success factors (CSFs).  
Steps on the way: e.g. 200th employee, new premises, hiring a BusDev Director, hitting 25% net profit...

Level 5: KPIs are key measures that matter: e.g. turnover, profit, cash, outstanding invoices, new clients, proposal conversion, complaints...

# Milestones and KPIs

## Level 4: Milestones

## Level 5: Key Performance Indicators

As the list of key performance indicators (KPIs) suddenly gets out of hand, and as people recall the fear and trepidation that KPIs create, I ask you to trust us and go along with this particular process. While left in limbo for the moment, we will return (in Part 3) to create, focus and simplify the KPIs so that you can create a dashboard that you can use to run and monitor business performance.

Clients who use the dashboard process find that it makes everything simpler. It is a limited number of key metrics that focus on the achievement of your Vision, Mission and Strategy. They act like the lights in the airplane cockpit, feeding you the vital information that you need to be monitoring.

## The Wallpaper exercise: Mapping out the journey ahead

Having mapped out the Cascade, which is a relatively logical, step-by-step process, this new exercise lets us test how the plans might roll-out. This is an examination of how things might take place. These plans will be translated into the goals and initiatives you will be monitoring and evaluating in your Journal.

### Why use the Wallpaper exercise?

This visual exercise gets everyone involved and engaged. You can see the journey and the timeline and you can see the resource requirements and the outputs required. As a team exercise this creates buy-in and lively conversation and debate as the team map out how the various parts of the business will interconnect and work for each other.

### What is it?

You literally take a roll of wallpaper. Lay it out across several tables (stick it down with masking tape). Map out a timeline and fill in where you are now and where you want to be in three years' time. Then fill in the gaps.

### How to use it?

Once you have agreed the various parts of the Cascade, translate the words into a timeline chart. Use post-its or pencils and erasers so that nothing is final but can be moved and adjusted.

“ The Wallpaper exercise was the meeting of minds for my senior management team and the board of trustees. It was where the words of the Cascade started to come to life. Everyone could see that things had to be in a certain order and that all initiatives were not equal. It forced us to prioritise and confront how we best use our scarce resources. We created the first plan that anyone really believed in! And now it's up on the wall for all to see. ”

—David Rouse, Finance Director

The best way to map out the Check-in Journal's "Where are we now? Where are we going? How are we going to get there?" exercises is to plot your path on a long piece of wallpaper – with the months written across the top from "Today" to "Today +36 months" – where you can start to piece together the targets and required resources as well as timings and order of work.

### The Wallpaper exercise

Use a few metres of wallpaper or the template below. Plot current performance and three-year goals, then fill in the steps on the way. Here's an example followed by a blank template. For examples of the wallpaper exercise go to [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub).

### Instructions

1. Fill in key metrics for "Now"
2. Fill in key metrics for "+3y", where you want to be in three years' time
3. Fill in key activities on the timeline.

**Top tip:** If you use wallpaper, then use post-its to enter your goals and activities. If you are writing in the Journal, then use a pencil and eraser!

**WALLPAPER-SAMPLE**

| NOW        |                           |          | +1Y                             | +2Y           | +3Y       |
|------------|---------------------------|----------|---------------------------------|---------------|-----------|
| FINANCIALS | T/O                       | 100      | ↑P<br>120                       | 150           | 200       |
|            | NP.                       | 10 (10%) | 13.2 (11%)                      | 18 (12%)      | 26 (13%)  |
|            | O/H                       | 60 (60%) | 70 (58%)                        | 87 (58%)      | 114 (57%) |
|            | d.cost                    | 30 (30%) | 36.8 (30%)                      | 45 (30%)      | 60 (30%)  |
| MARKETING  | New Gold Clients          | 10       | REBRAND<br>15                   | 20            | 25        |
|            | Cost of Cust. Acquisition | 5 k      | 5 k                             | 5 k           | 5 k       |
|            | Cust. Lifetime Value      | 15 k     | WEBSITE<br>25 k                 | 25 k          | 25 k      |
|            | Ave. Transaction Value    | 5 kpm    | REVAMP<br>5 kpm                 | 6 kpm         | 6 kpm     |
|            | Sales Team                | 5        | 6                               | 7             | 8         |
| OPERATIONS | Ops Team                  | 25       | FEB<br>NEW PREMISES<br>26       | 37            | 38        |
|            |                           |          | JUNE<br>OP-COSTS                |               |           |
| PEOPLE     | Head Count                | 45       | JAN<br>50                       | 68            | 70        |
|            | Board                     | 4        | NEW HR DIR<br>5                 | 6             | 7         |
|            | Fred's role               | MD       | MD                              | NEW MD<br>CEO | RETIRED   |
|            |                           |          | FEB<br>NEW H OF BUS             |               |           |
|            |                           |          | JUNE<br>OPERATION<br>OP CULTURE |               |           |

WALLPAPER-SAMPLE

| NOW        | +1Y | +2Y | +3Y |
|------------|-----|-----|-----|
| FINANCIALS |     |     |     |
| MARKETING  |     |     |     |
| OPERATIONS |     |     |     |
| PEOPLE     |     |     |     |

## Government health warning

The creation of the Wallpaper is the start of a bigger process, a process that will make it easier to run and lead the business. A process that will help you to understand, agree, gain buy-in and achieve your goals faster and with less pain.

Imagining a vision for three years' time is more of an art than a science.

Who really knows how things will change for customers, competitors, the marketplace, the industry or in the political, economic, societal, technological, legislative and environmental worlds?

The Three-Year Goal is an aspiration, an articulation of the direction and rate of trajectory that you intend to follow. A way of making your mistakes on paper.

The reality is that having put together the big plan then you really need to focus on the next quarter, month, seven days and one day. It is all very well planning a great plane trip but first you have to get off the runway!

The generation and creation of the Wallpaper creates the key initiatives for the coming year.

## Postscript

The materials and templates above are, to some extent, just the start of the business planning process. While it is not entirely necessary to create reams and reams of supporting reports, we have included some additional tools in Part 3 of the Journal. Use them if you feel they are appropriate for your situation. The documents in Part 3 are normally used as the next layer of supporting materials.

Remember: the purpose of the planning section of the Journal is to articulate exactly what it is that you are trying to do. The best way to do that is to clarify, simplify and focus on the key goals.

## The Annual Business Plan

The final part of the business exercises is the business plan. Based on all your previous exercises, these are the numbers and initiatives that you will transfer into your Journal.

### Why use the Annual Business Plan?

It puts all the key initiatives and goals on one page.

### What is it?

This is a rough version of your plan for the business.

### How to use it?

It is best to use the plan now, having gone through all of the earlier exercises.

So, where are we now? We have agreed or reflected on all the aspects of the plan for the business. We can concentrate all your work to date in the following Annual Business Plan.

**Annual Business Plan**

|                        |                             | YEAR ONE INITIATIVES |     |      |
|------------------------|-----------------------------|----------------------|-----|------|
|                        |                             | BUDGET               | WHO | WHEN |
| PURPOSE                | VALUES                      | FINANCIAL            |     |      |
|                        | PURPOSE/PASSION             |                      |     |      |
|                        | NICHE                       |                      |     |      |
|                        | BHAG                        | MARKETING            |     |      |
| VISION                 | WANT TO BE KNOWN FOR:       |                      |     |      |
| MISSION                | NUMBERS:                    | OPERATIONS           |     |      |
|                        | THE BUSINESS WILL LOOK/FEEL |                      |     |      |
| STRATEGY               | HOW WE'LL DO IT:            | PEOPLE & CULTURE     |     |      |
| MILESTONES:            |                             |                      |     |      |
| PERFORMANCE INDICATORS |                             | OTHER                |     |      |

# Personal Planning

This personal development section may appear to be shorter than the business section, but it is the part that most people find of most value. The reason for this is that many people are just too busy and don't have time to step back and review their progress.

Different people approach the personal planning differently. Horses for courses!

“ My best personal planning takes place when I am away from everything. A café in a foreign country or when I am stuck in a hotel room while working away from home. ”

—Claudia Manzoni, IT Director

“ I set aside a 'cave day'. I literally book into a hotel and spend a whole day sitting and thinking and reflecting. ”

—David Storey, Director

## **Probably Your Best Year Yet exercise: Identifying your roles and goals**

The main exercise in the personal planning section is *Probably Your Best Year Yet*. If the Cascade is the heart of the business planning, then this is the heart of the personal planning and is the basis for all personal goals in the Journal.

### **Why use the Probably Your Best Year Yet exercise?**

While most are happy to plan their business activity, few apply the same methodology to their private life. It makes sense to use a similar discipline. In fact, it is only when we get the business and the personal goals and actions all working together that things really become electric!

### **What is it?**

We started the Check-in exercises with the Wheel of Life and the Three-by-Three Strategy Matrix, which got you to score your current “performance” and articulate your goals. (You may wish to revisit them.) This exercise challenges you to identify success and failure, your key roles and goals for your personal life, and prioritise accordingly. No small task.

### **How to use it?**

This is a quiet room activity. You may need time. Quite a lot. There may be few questions and not a lot of paper, but this will get you really thinking.

The following worksheets address your recent successes and failures and are a great way to calibrate where you are and where you would like to focus your efforts over the coming year.

Go to [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub) to see examples and templates.





### Probably Your Best Year Yet (cont)

8. For the eight key goals, now address how you are going to achieve them. For each goal:
  - How will you know that you have achieved it?
  - What resources do you need?
  - When will you have completed it?
  - What other things is it dependent on?
  - What are the steps? Work out a timetable. Map your plan. This is a draft for your Annual Personal Plan (the next exercise).

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

Goal 6:

Goal 7:

Goal 8:

9. Oh, and one more question! Which actions or behaviours have you used to (subconsciously) sabotage your previous efforts to succeed? What things might limit your success this time and how can you remove them?

## The Annual Personal Plan

While many people have a business plan they work to, far fewer have a personal plan. You need to plan so you can measure and evaluate your progress towards your goals. Based on the previous Probably Your Best Year Yet work, you will keep returning to this in your Journal – either to remind yourself of what you set out to achieve or to revise your plans and goals.

### **Why use the Annual Personal Plan?**

It puts all the key initiatives and goals on one page.

### **What is it?**

This is your personal plan.

### **How to use it?**

It is best to complete the plan now, having gone through all of the earlier exercises.

### **So, where are we now?**

We have agreed or reflected on all the aspects of the plan for the business. And now we agree the annual personal plan.

### **Instructions:**

Concentrate all your personal work to date in the following Annual Personal Plan.

Examples can be seen at [www.checkinjournal.com/thehub](http://www.checkinjournal.com/thehub).

**Annual Personal Plan**

| <b>AREA/ACTIVITY</b> | <b>RESOURCES REQUIRED</b> | <b>COMPLETION INDICATOR</b> | <b>DEPENDS ON...</b> | <b>TIMETABLE. STEPS ON THE WAY...</b> |
|----------------------|---------------------------|-----------------------------|----------------------|---------------------------------------|
| 1                    |                           |                             |                      |                                       |
| 2                    |                           |                             |                      |                                       |
| 3                    |                           |                             |                      |                                       |
| 4                    |                           |                             |                      |                                       |
| 5                    |                           |                             |                      |                                       |
| 6                    |                           |                             |                      |                                       |
| 7                    |                           |                             |                      |                                       |
| 8                    |                           |                             |                      |                                       |

Congratulations: you have now completed Part One, the exercises section. As you move to Part Two, the Journal, you will take all the work to date and apply it to Quarter 1 (Q1). Instructions are at the front of Part Two.