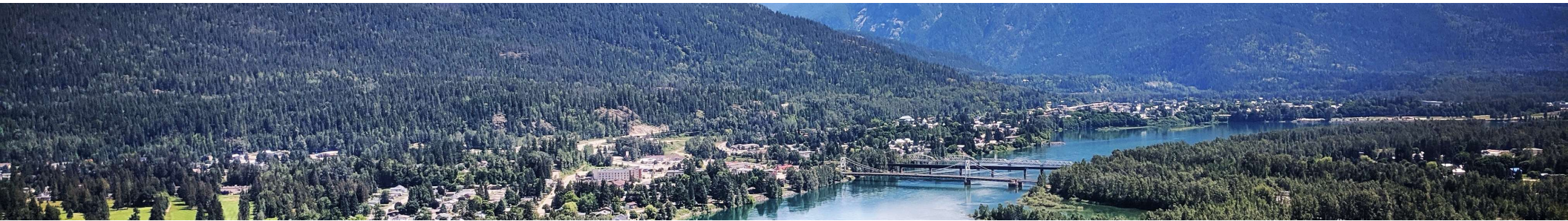


Leadership Learning Pathway Working Group 2

Denise MacDonald & Steve Fisher
BBA Business Advisors





Making the Plan – Part 1



Breaking it down one step further...

This is a really broad and daunting topic; how can we create an actionable focus?





Company 3-5 Year Vision: Example

Owner(s) and CEO level initiative

1. Pay myself a (minimum) salary of \$150K
2. Increase revenue to \$2.2 million. (Forecast \$900,000 gross revenue this fiscal year)
3. Increase net profit margin to over 11% and gross margin to over 48%
4. Purchase commercial property
5. **Sally (CEO) focused on leadership roles and delegate current non-CEO tasks. Working 30-35 hours per week (max)**
6. Working 50% “ON” the business as CEO function
7. Add 2 new product lines to address the lower income segment of our target market
8. Expand into Invermere and Columbia Valley markets
9. Future state functional Org Chart achieved

Company 3-5 Year Vision: Example

Owner(s) and CEO level initiative

Within 3 years, I want to be working 35 hours per week (max)

Company 1-Year Goals: Example

CEO and senior management level initiative

Reduce work week from 50 hours to 45 hours maximum, and be working minimum of 8 hours a week ON the business

Quarterly Objective & Key Results (OKR): Example

Management initiatives with CEO oversight

Hire and empower a bookkeeper (external contractor)

Develop bookkeeper Job Description with clear accountabilities

Develop a recruiting, hiring, onboarding and training process (integrating the MVV into hiring)

NOTE: This becomes the beginning of an SOP for hiring for other positions

Develop a Standard Operating Procedure (SOP) for Month End Reporting process

Quarterly Objective & Key Results (OKR): Example

Management initiatives with CEO oversight

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Weekly Priorities & Daily Tasks

Weekly Priorities/Next Steps

- 1) Review 3 job description templates and pick 1 for your company

Quarterly Objective & Key Results (OKR): Example

Management initiatives with CEO oversight

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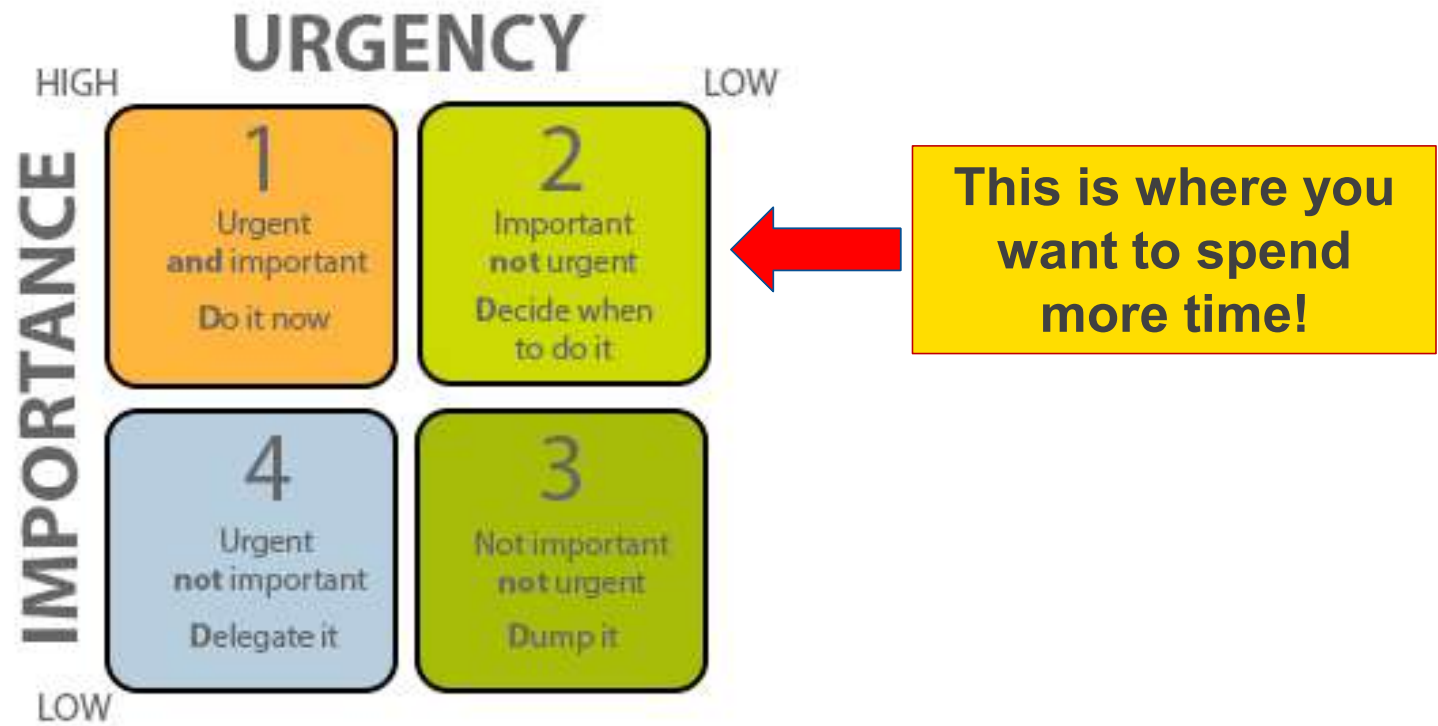
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Weekly Priorities Daily Tasks

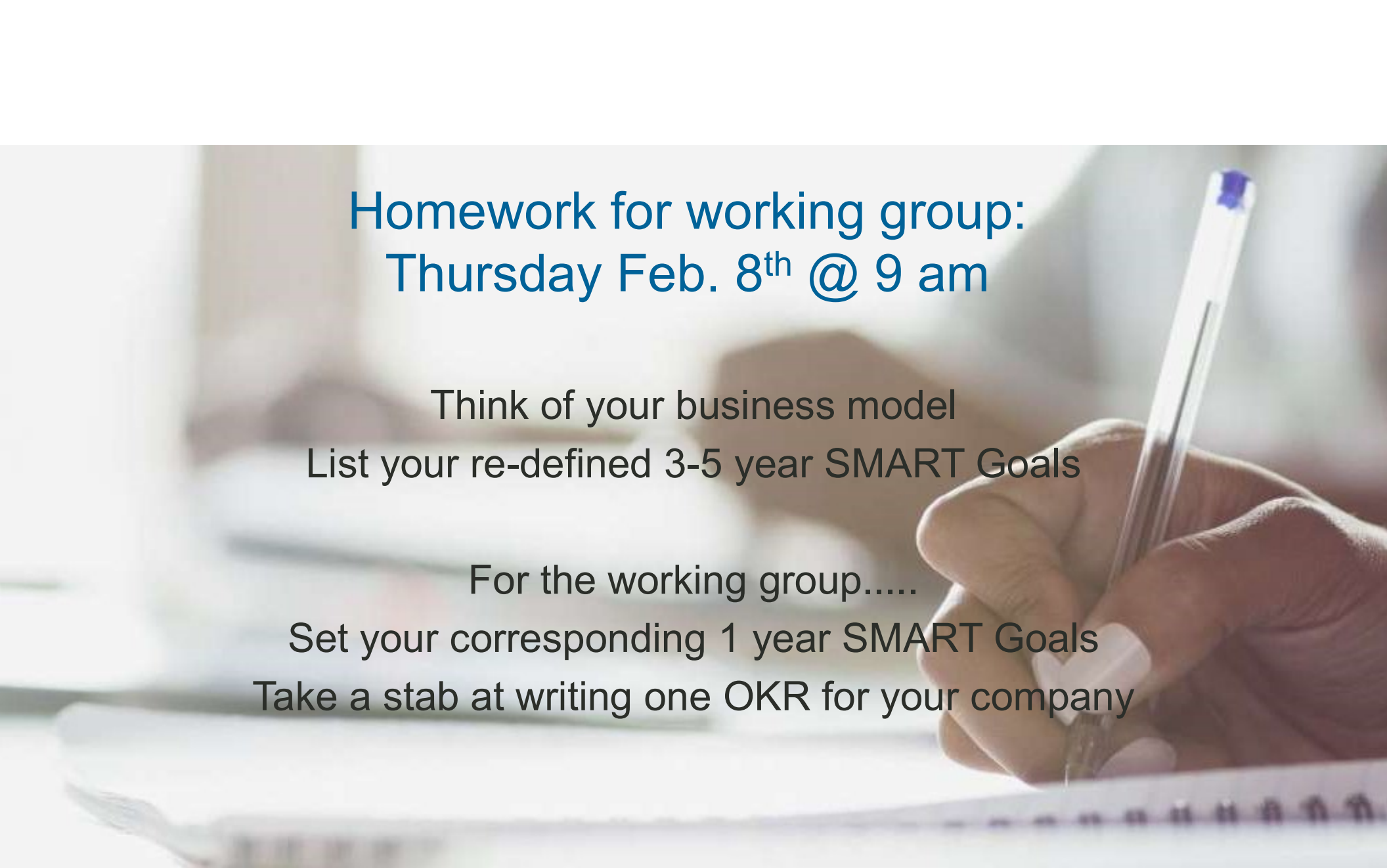
Weekly Priorities/Next Steps

- 1) Review 3 job description templates and pick 1 for your company
- 2) Build set of 10 interview questions, which vet for:
 - Values Alignment
 - Skillset
 - Grit/Taking Initiative and responsibility

The 4 Quadrants Once Again....



Let's Demonstrate in Excel



Homework for working group: Thursday Feb. 8th @ 9 am

Think of your business model
List your re-defined 3-5 year SMART Goals

For the working group.....
Set your corresponding 1 year SMART Goals
Take a stab at writing one OKR for your company



Pre-Work for Session 3: Thursday, Feb. 15th at 9 am

Watch Simon Sinek's TED Talk:
"Start with Why – How Great Leaders Inspire Action."



Thank you!

Presented by Denise Mac Donald and Steve Fisher

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ADVISORS**

Notes