Growing Beyond Small: Achieve Greater Results in 2017
How would you rate Fiscal Year 2016?
(Rating System 1 = disaster   10 = brilliantly successful)

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Growth</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>Profits</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Gross Margin</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Unit Sales/Billable Hrs</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Cash Flow</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>New Biz Development</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Customer Retention</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Customer Service</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Employee Retention</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>New Products</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>Mgt Team Execution</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Biz Plan Effectiveness</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Impact of Budgets</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Quality</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
</tr>
<tr>
<td>Environmental Consciousness</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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<tr>
<td>Overall Rating</td>
<td>1 2 3 4 5 6 7 8 9 10</td>
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</tbody>
</table>
The One Page® Mini Assessment
Client Acquisition: What’s Working? What’s Not?

Reflect & Re-think
- North

Lessons Learned

Endings
- West -

What’s not working?

What’s working?

Fresh, New Ideas

Beginnings
- East -

Grow & Expand
- South -
What will make next year better?

- Economy
- Technology
- Availability of Capital
- Mgt Team Execution
- Status in industry
- Momentum
- Advertising
- Marketing
- Sales Team
- Operations

- Controls/Procedures
- Internet
- Training
- Planning
- Budgets
- Competition
- Other _____________
- Other _____________
- Other _____________

What do you want from your planning efforts
We call this exercise, Bend the Curve.

**Step 1:** Draft an Income, Revenue or Production Objective for the next 1, 3 or 5 years.

**Step 2:** Brainstorm up to four Strategies that are necessary to achieve the Objective in Step 1.

**Step 3:** Identify 2 to 4 key Action Plans per Strategy. Action Plans are typically Projects or Programs.

Increase __________ from __________ to __________ by __________.

(Example: Increase total income from $300,000 to $500,000 by 12/31/2010.)
Objectives Formula

*Action to be taken*

+ 

*Graphable Results*

+ 

*Completion Date*

5 simple guidelines to craft meaningful objectives

- Objectives are Graphable Business Results
- Include numeric value objective (not just dollar values)
- Use of "from ______ to ______" Statements helps to give time & growth perspective.
- Assign a name (if appropriate) & date to assure accountability.
- Objectives in your plan are most critical to your success.

Samples:

Increase sales from $1.2 million to $3.0 million by December 31, 2018

Reduce cost of goods sold from 43% to 38% by June 30, 2017

Increase # of active clients from 46 to 60 by December 31, 2017

Reduce credit line from $350,000 to $150,000 by September 30, 2017

Decrease average shipping time from 5 days to 3 days June 30, 2017
# Quickstart Ideas for Strategies

## Fill-in-the-blanks

How will we build this business? What will make it successful over time?

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Suggested One Page Phrasing</th>
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<tbody>
<tr>
<td><strong>Growth</strong></td>
<td>Grow business by __________, __________, __________.</td>
</tr>
<tr>
<td><strong>Positioning</strong></td>
<td>Become nationally known for _________________.</td>
</tr>
<tr>
<td><strong>Revenue Model</strong></td>
<td>Generate revenues by __________, __________ &amp; __________.</td>
</tr>
<tr>
<td><strong>Markets</strong></td>
<td>Focus on __________, __________ &amp; __________markets.</td>
</tr>
<tr>
<td><strong>Products</strong></td>
<td>Core product offerings are __________, __________ &amp; __________.</td>
</tr>
<tr>
<td><strong>New Products</strong></td>
<td>Use New Products(Services) to __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Add-on Products</strong></td>
<td>Use Add-on Products (Line Extensions) to _________________.</td>
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<tr>
<td><strong>Line Extensions</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Client/Customer Acquisition &amp; Management</strong></td>
<td>Build client base by __________, __________ &amp; __________.</td>
</tr>
<tr>
<td><strong>Retention</strong></td>
<td>Retain client base by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Pricing</strong></td>
<td>Key pricing strategies are __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Initial trial</strong></td>
<td>Promote initial trial of products by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Add-on revenues &amp; repeat sales</strong></td>
<td>Generate repeat sales by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Staffing</strong></td>
<td>Create Add-on sales by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Internet</strong></td>
<td>Attract &amp; retain key employees by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Technology</strong></td>
<td>Use Internet to __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Strategic Alliances, Business Partners</strong></td>
<td>Use strategic alliances to __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Infrastructure</strong></td>
<td>Develop ______ infrastructure to __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Culture</strong></td>
<td>Foster ____________ culture by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Management Style</strong></td>
<td>Develop ____________ mgt style to __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Change</strong></td>
<td>Change ____________ by __________, __________ &amp; __________.</td>
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<tr>
<td><strong>Exit</strong></td>
<td>Exit business by __________, __________ or __________.</td>
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</table>
There are four quarters in a year. List one or two major business building projects your company/department must accomplish in each of the next four quarters in order to implement your strategies and achieve your business goals.

Remember…Time exists so that everything does not have to happen at once!
The Power of No!

What you choose to leave out of your One Page Business Plan® may be more important than what you put into your plan! Frequently the design of our business is significantly influenced by what we decide not to do. Today, let's take a quick look at your business and use *The Power of No* to eliminate what’s not working…and make it work better!

<table>
<thead>
<tr>
<th>What’s Not Working in your Business?</th>
<th>What must you <strong>STOP</strong> doing to make the problem go away?</th>
<th>What will you do differently, now that you have said NO!</th>
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The One Page Business Plan methodology is the fastest, easiest way to write a plan. Using key words and short phrases plans can be created for a company, business unit, department, project or program… on a single page. This methodology focuses everyone in your company on what is important and critical for success!

**Colorado Garden Window Company**

**FY2013 Business Plan**

Within the next 3 years grow Colorado Garden Window Company into a $40 million national home products company specializing in manufacturing and distributing custom and replacement garden windows and skylights to baby-boomers and home remodelers.

**Vision**
What are you building?

Bring Light, Air, and the Beauty of Nature into homes… through creative windows!

**Mission**
Why does this business exist?

- Achieve 2013 sales of $17 million.
- Earn pre-tax profits in 2013 of $1.5 million.
- Target Cost of Goods Sold at 38% of sales.
- Reduce inventory levels to 3.3 months on hand by August 31.
- Grow Garden Window Division at 8% per year & achieve $5.3M this year.
- Expand skylight/custom window product lines; grow sales to $7.5 million this year.
- Implement profit improvement programs & reduce product costs to 38%.
- Achieve 98% on time delivery with 98% order accuracy by 1st quarter.

**Objectives**
What will you measure?

Focus on new upscale home developments and baby-boomer remodeling trends.
- Build Colorado Garden Window Co. into a nationally recognized brand name.
- Control quality processes by manufacturing solely in-house.
- Increase capacity & manufacturing efficiency by actively reducing duplicate products.
- Centralize distribution into one location; reducing costs & improving service.

**Strategies**
What will make this business successful over time?

- Introduce new scenic Garden Window at S.F. products show 3/15.
- Roll out new package design beginning April 1.
- Expand Sales Dept. to focus on Signature Homes in Denver and Provo by 4/15.
- Introduce inventory reduction program company-wide by 5/15.
- Fully implement new MRP software to achieve inventory reduction by 7/1.
- Complete skylight product rationalization program by 8/15.
- Research, design and roll out re-designed employee benefit program by 10/1.
- Complete product distribution consolidation project by 11/15.

**Action Plans**
What is the work to be done?
The One Page Business Plan® for _______________

**Vision**

What are we building? (5 yrs.)

**Mission**

Why does this non-profit exist? (“Timeless”)

**Objectives**

Suggestion: Limit to one line

- Objective 1
- Objective 2
- Objective 3
- Objective 4
- Objective 5
- Objective 6
- Objective 7
- Objective 8

What will we measure?

**Strategies**

Suggestion: Limit to one line

- Strategy 1
- Strategy 2
- Strategy 3
- Strategy 4
- Strategy 5
- Strategy 6
- Strategy 7
- Strategy 8

What will make this non-profit successful overtime?

**Plans**

Suggestion: Limit to one line

- Action Plan 1
- Action Plan 2
- Action Plan 3
- Action Plan 4
- Action Plan 5
- Action Plan 6
- Action Plan 7
- Action Plan 8

What is the work to be done?