

Which Company is Worth More?

Company A



Company B

WELCOME
Karen Franklin
CEO

- Dashboard
- Quarterly Updates
- CHARP Updates
- KPI
- Milestones / Rocks
- Review Questions
- Outcome Statement
- Department
- Roles
- Users

What to focus on this week.

Category	Value	Target
YOU	50%	2/4
LEADERSHIP	89%	8/9
EMPLOYEES	50%	2/4
CUSTOMERS	50%	2/4
FINANCIAL PARTNERS	100%	3/3
CASH	33%	1/3
GROWTH	33%	3/9

Corporate Targets for Growth

KPI	Target	Unit	Actual
1 Increase New Logos	30	percent	1 (25%)
2 New Hire Growth	3	percent	2 (66%)
3 Annual Growth Rate	1	percent	0 (0%)
4 New Industry Revenue	3	percent	1 (33%)

Milestone Check-ins

- Change: 36
- Help: 0%
- Aware: 0%
- Redirect: 0%
- Plan: 48%
- Done: 15%

Salesforce Overview

Individual Targets & Performance

- Raj Khan
- Janet Ramson
- Bob Kalinski
- Alex Stewart

RECOMMENDATION

Janet is underperforming and not meeting targets for lead generation or likely completing the coaching program on time. Discuss this immediately and consider a PIP.

JANET'S PROGRESS

Coaching Progress: **27% complete**

Next Review: **Dec. 15, 2020**

DISC Assessment: **S/C**

Enneagram Assessment: **1**

Myers-Briggs Assessment: **I N T J**

JANET'S OUTCOMES

KPI	Target	Unit	Salesforce Actual
1 Increase New Logos	30	percent	13 (25%)
2 Social Media Lead Gen	2,500	new leads	489 (28%)
3 Trade Show Lead Gen	1,500	new leads	763 (51%)

JANET'S MILESTONES

KPI	Due Date	Status	Who
1 5 new salespeople	4/9/2020	P	Raj Khan
2 Update CRM	6/18/2020	C	Karen Franklin
3 Hire 2 sales leaders	5/16/2020	C	Janet Ramson
4 New marketing campaign	5/5/2020	P	Bob Kalinski
5 New product roadmap	7/9/2020	C	Janet Ramson

Company B is
World Class

World Class?

What do You Think?

World Class?

Any Size?



Yes, you can.

Yes, you should.

Yes, you will!

Scale with ease.

Grow 7x faster.

Focus to be efficient.

Live healthier.

Plan and do.



1:20:00



Question: which is the most important accelerating ingredient of a world class company?



Question: Which is the most important accelerating ingredient of a world class company?

Mission

why?

Vision

Impact?

Values

Culture?



Mission

Our mission is to empower our people to provide the most innovative solutions for our industry so we can build a brighter future for all.

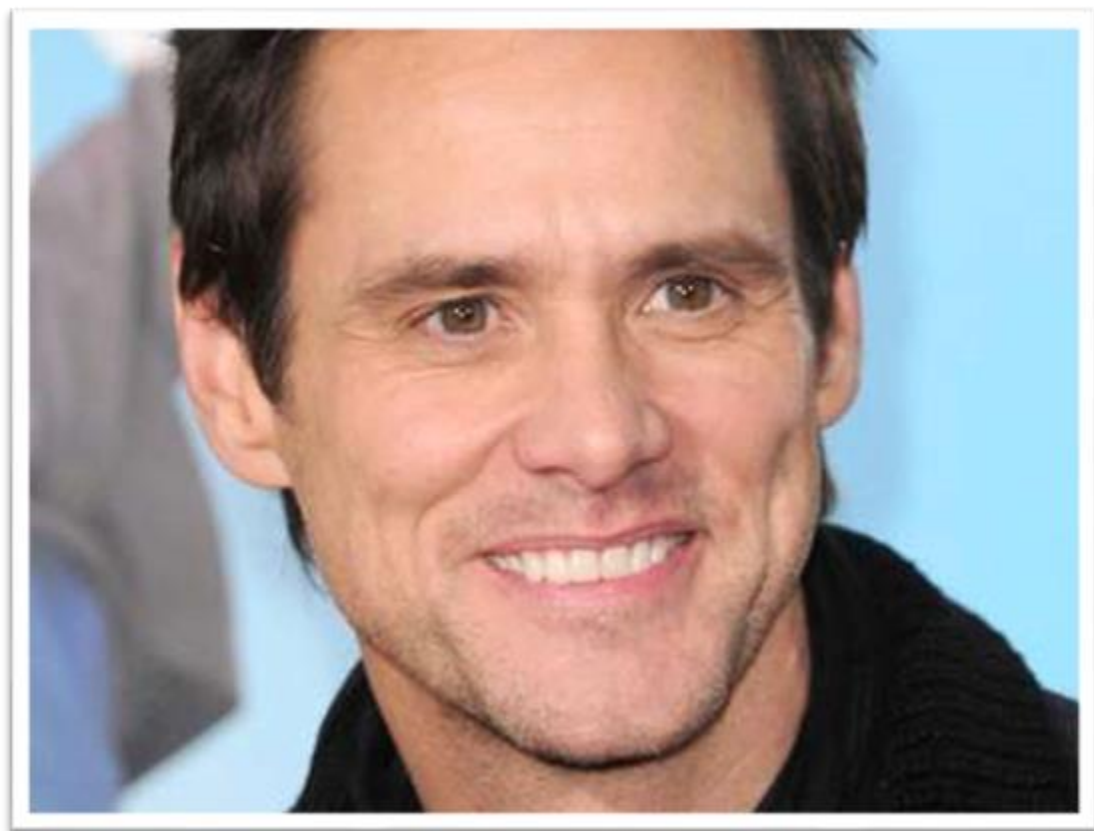
Vision

Our vision it to become the industry leader for creative, innovative, and environmentally sustainable solutions to the industry's most challenging projects.

Values

Our values are transparency, integrity, accountability, respectfulness and a winning attitude.





Acme Three-Year Outcome

The year is 2024 and Acme is a highly stable, highly profitable industry leader in the construction and design of public and private construction projects. We have the highest retention in the industry and a team that is accountable to each other for achieving our personal, departmental and company outcomes. We have \$100 MM in revenue and a 6% NP.

Sample

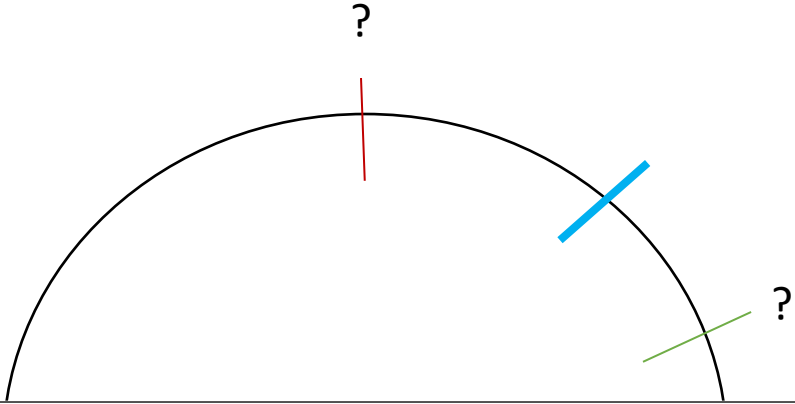
Personal & Business

The year is 2024 and I am jogging five miles a day, have read 36 books, taken time off and have managed to save while helping my department and my company become a highly stable, highly profitable industry leader in the construction and design of public and private constructions projects. We have the highest retention in the industry and a team that is accountable to each other for achieving our personal, departmental and company outcomes. We have \$100 MM in revenue and a 6% NP.

Take five minutes and write a quick outcome statement for your company.



What is a KPI?
(Key Performance Indicator / Goal)



Must be **quantifiable**.

Must associate with your **outcome**, not industry standards.

What do I need to achieve in order to hit my three-year objective?

You

Leadership Team

Employees

Customers

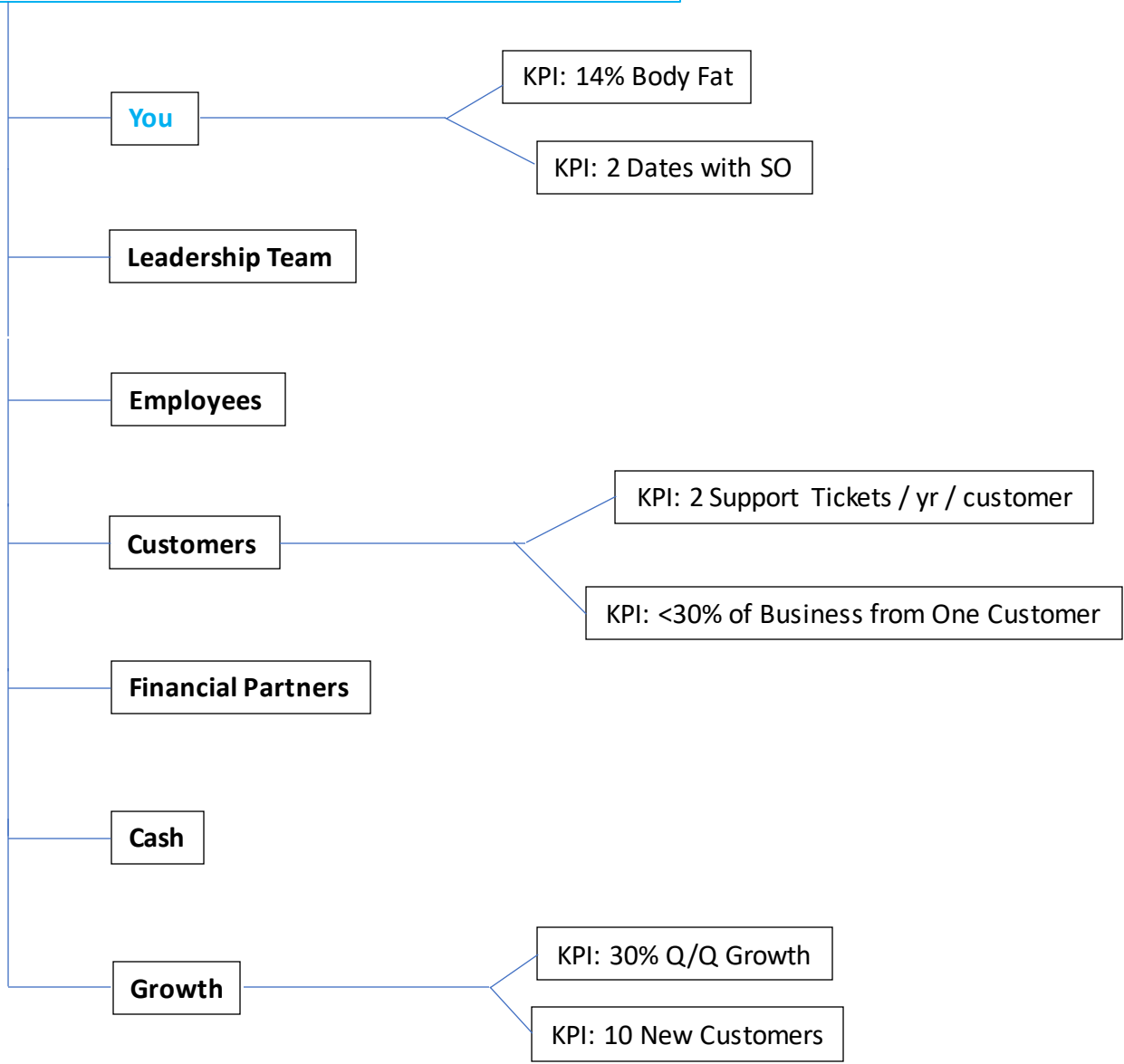
Financial Partners

Cash

Growth

Now, what do YOU have to accomplish in the CUSTOMER driver to achieve that Outcome Statement.

What do I need to achieve in order to hit my three-year objective?



Where

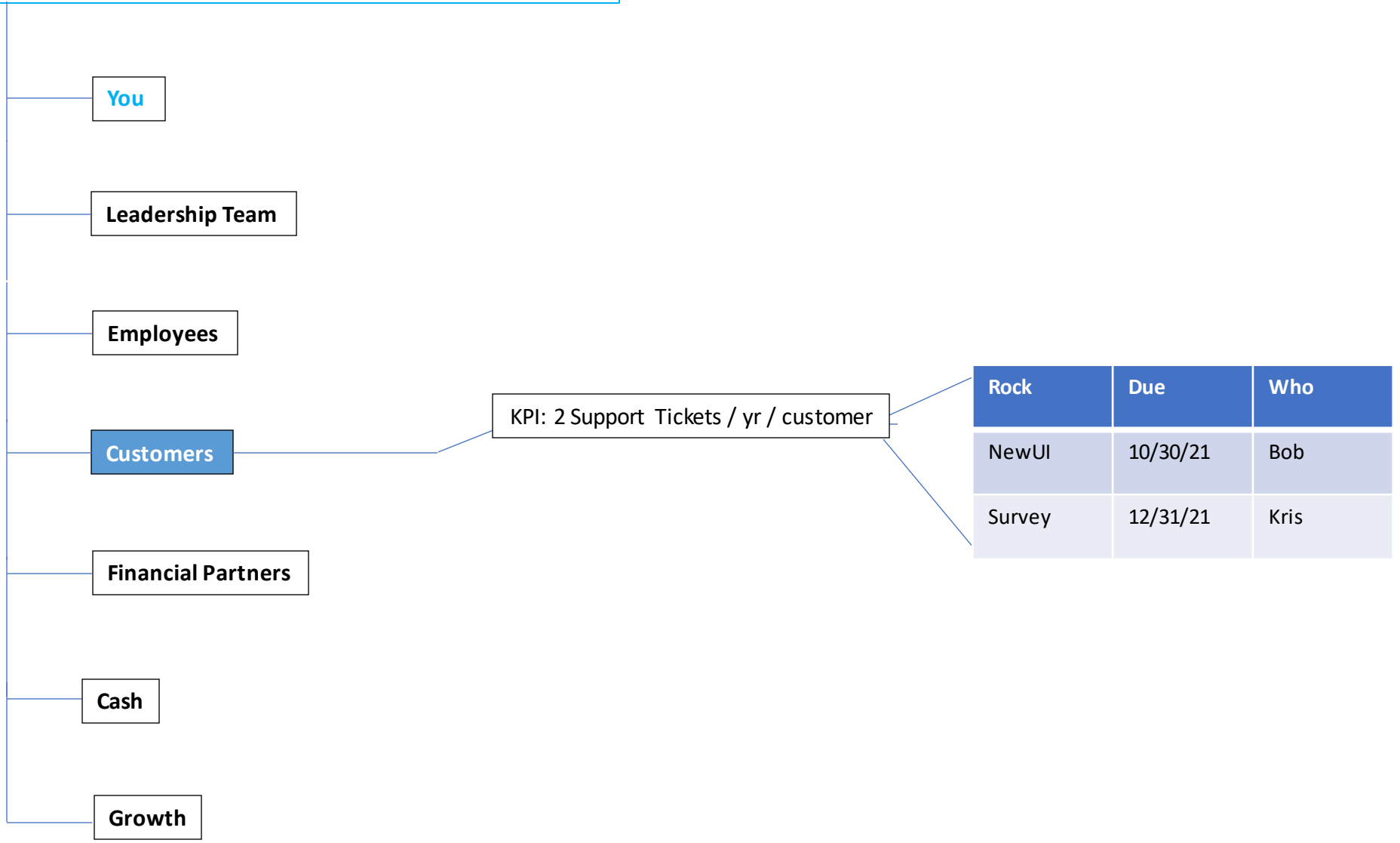
What

How

Action Items & Rocks

so you can roll.

What do I need to achieve in order to hit my three-year objective?



Take two minutes and think about two major things that have to happen for you to hit one of the KPIs.

Refer to the hand-outs.



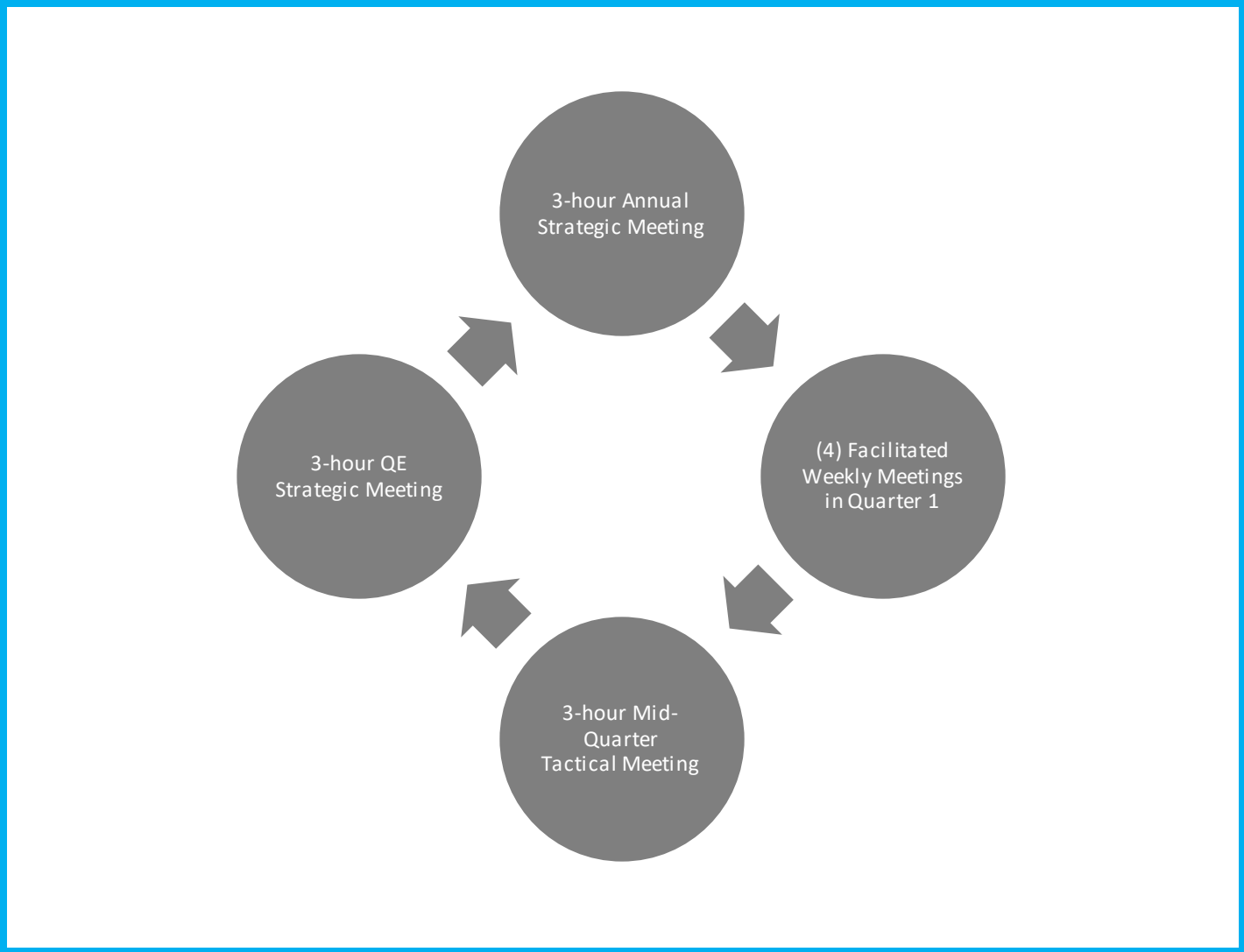
Rhythm

Mission

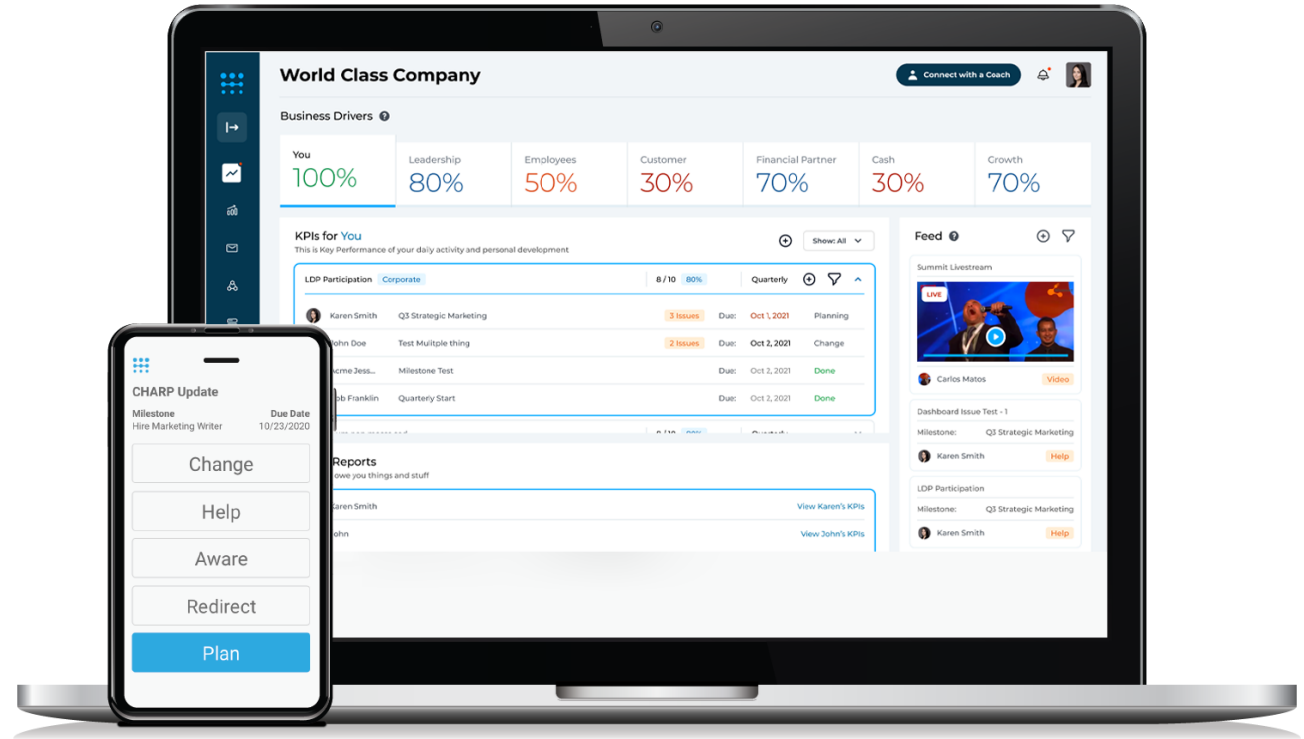
Values

Vision

KPIs & Rocks



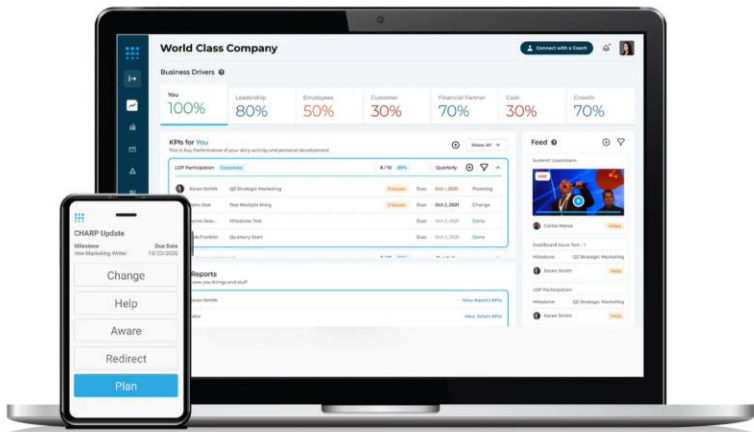
Ok, there is a resource to get this done in **minutes**...and you can get it **free**.



One Click

to World Class Growth and Value

Get a grip on growth while increasing value and saving a ton of time.



Designed by business owners and coaches to be the fastest and simplest approach to running, scaling and increasing the value of your company.



Create a Plan in Seconds

Develop a complete, multi-year, KPI driven plan in less than an hour. Our fast-paced planning system walks you through a series of steps that will help you create and run a world-class plan.



Run on Rhythm

Based on your plan, Catapult creates weekly, semi-quarterly, quarterly and annual meeting agendas using our fast-paced, Power Board reporting format. KPIs, action items, and issues are automatically loaded and guided for team review by Catapult.



Communicate on Plan

Communicate about your plan, on your plan. Meeting notes, issues from the team, and Action Item updates and status are all communicated in Catapult, keeping your team out of e-mail.

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1. \$50,000 plan
2. Intelligent Meetings
3. Unlimited license to Level 1 Catapult University
4. Free KPI review call
5. Free VTO import
6. Slack channel of Catapult users and owners
7. Your chair gets a free license with the portfolio view

Get it here for the next 14 days!

<https://www.catapult.ai/IDOA22>

Let's get your thoughts &
questions.

World Class?

Take the SIMPLE health check

Sample Health Checklist

Key Value	Assessment
Mission	●
Vision	●
Values	●
Three-Year Outcome CEO	●
Three-Year Outcome Leadership Team	●
Corporate KPIs & Rocks	●
Leadership team KPIs	●
Leadership team Rocks	●
Director level KPIs	●
Director level Rocks	●
Clear Accountabilities	●
Processes to drive the Outcome	●
Right People to drive the Outcome	●
Rhythm	●

- Good
- Needs Review
- Needs Work
- Unknown / Needs Discovery

Questions?

Complete the company health check for your free software.

Software and Services

To help you build a world class company.

peter@catapult.ai

