

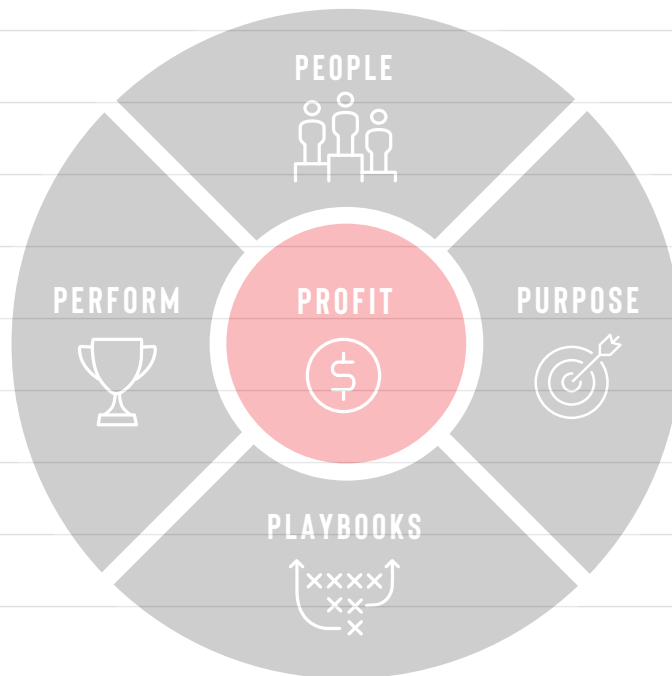


k7 LEADERSHIP

THE 2023 WORKBOOK

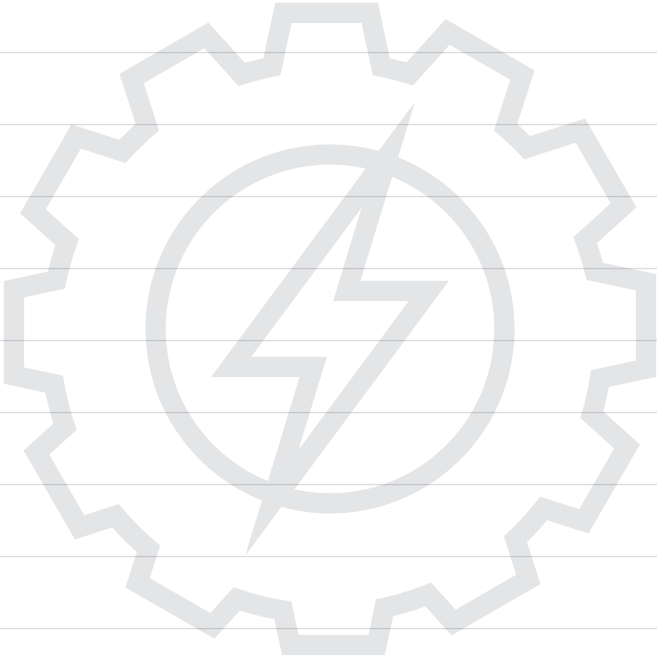
STRATEGIC GUIDANCE FOR BUSINESS GROWTH

POWERED BY YOU



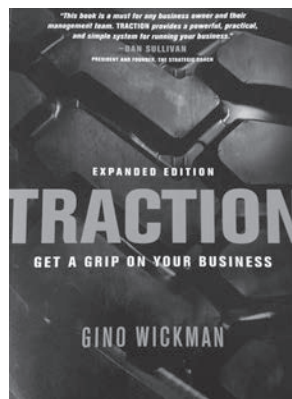
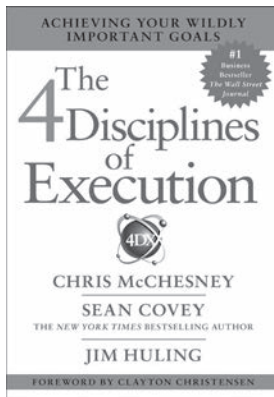
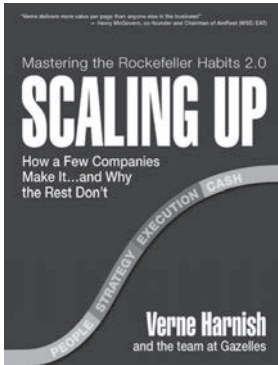


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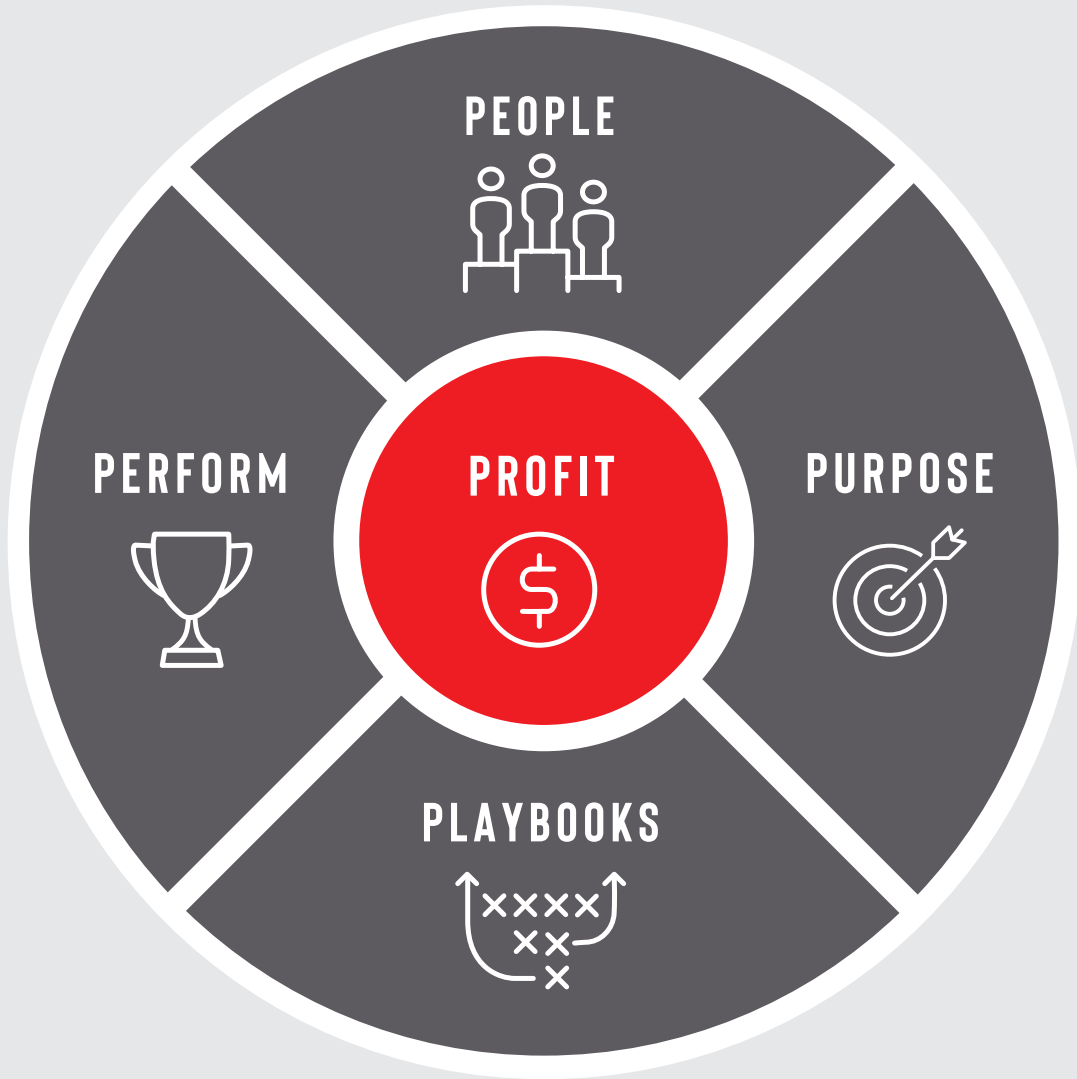


A BUSINESS OPERATING SYSTEM



DESCRIPTION	E MYTH	GREAT GAME OF BUSINESS	SCALING UP	EOS	4 DISCIPLINES OF EXECUTION
RIGHT PEOPLE IN THE RIGHT SEATS	◐	○	●	◐	◐
HIRING / RECRUITING "A PLAYERS" IN THE RIGHT SEATS	○	○	●	◐	◐
FUNCTIONAL ACCOUNTABILITY	◐	○	◐	●	◐
PROCESS ACCOUNTABILITY	◐	◐	◐	◐	●
VISION, PURPOSE, BHAG	●	○	●	◐	◐
STRATEGY	◐	◐	●	○	●
PLANNING	◐	●	◐	◐	◐
BUSINESS DEVELOPMENT	●	○	◐	◐	◐
MARKETING / BRANDING	◐	○	◐	◐	○
OPERATIONS EXECUTION	●	●	◐	●	●
PROCESS IMPROVEMENT	◐	●	○	◐	●
ROCKS / GOALS	◐	◐	◐	◐	●
DATA / SCORECARD	◐	●	○	◐	○
SCOREBOARD — WIN THE WEEK	○	○	●	○	●
TEAM HEALTH	○	○	◐	◐	◐
CASH FLOW MANAGEMENT	●	◐	●	○	○
OPEN BOOK MANAGEMENT	○	●	◐	◐	◐
PROFIT TOOLS	◐	○	●	○	○
STICKY TERMS	○	○	◐	○	◐
ENJOYABLE TO IMPLEMENT	◐	◐	◐	◐	◐
LEADERSHIP DEVELOPMENT	◐	◐	◐	◐	◐
FLEXIBILITY TO CUSTOMIZE TO CLIENT	◐	◐	●	○	◐

GRADE:	○ WEAK	◐ GOOD	◐ BETTER	● BEST
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THE PINNACLE PRINCIPLE

PEOPLE

+

PURPOSE

+

PLAYBOOK

+

PERFORM

=

PROFITS

CORE VALUES

Puts Company First

Strives for Excellence

Is a Problem Solver

Has a Positive Attitude

Is Always Improving

Is Resourceful

Does the Right Thing

Takes Initiative

Shows Grit

Is Authentic

Cares for Others

Hungers for Growth

Gets Stuff Done

Wants to Win

Takes Ownership

Treats All With Respect

Takes Pride in Workmanship

Enjoys the Work

Knows the Value of Reputation

Exhibits Loyalty & Commitment

Is a Great Team Player

Serves the Customer

Strives for Excellence

Is Meticulous

Is a Self-Starter

Maintains Accountability

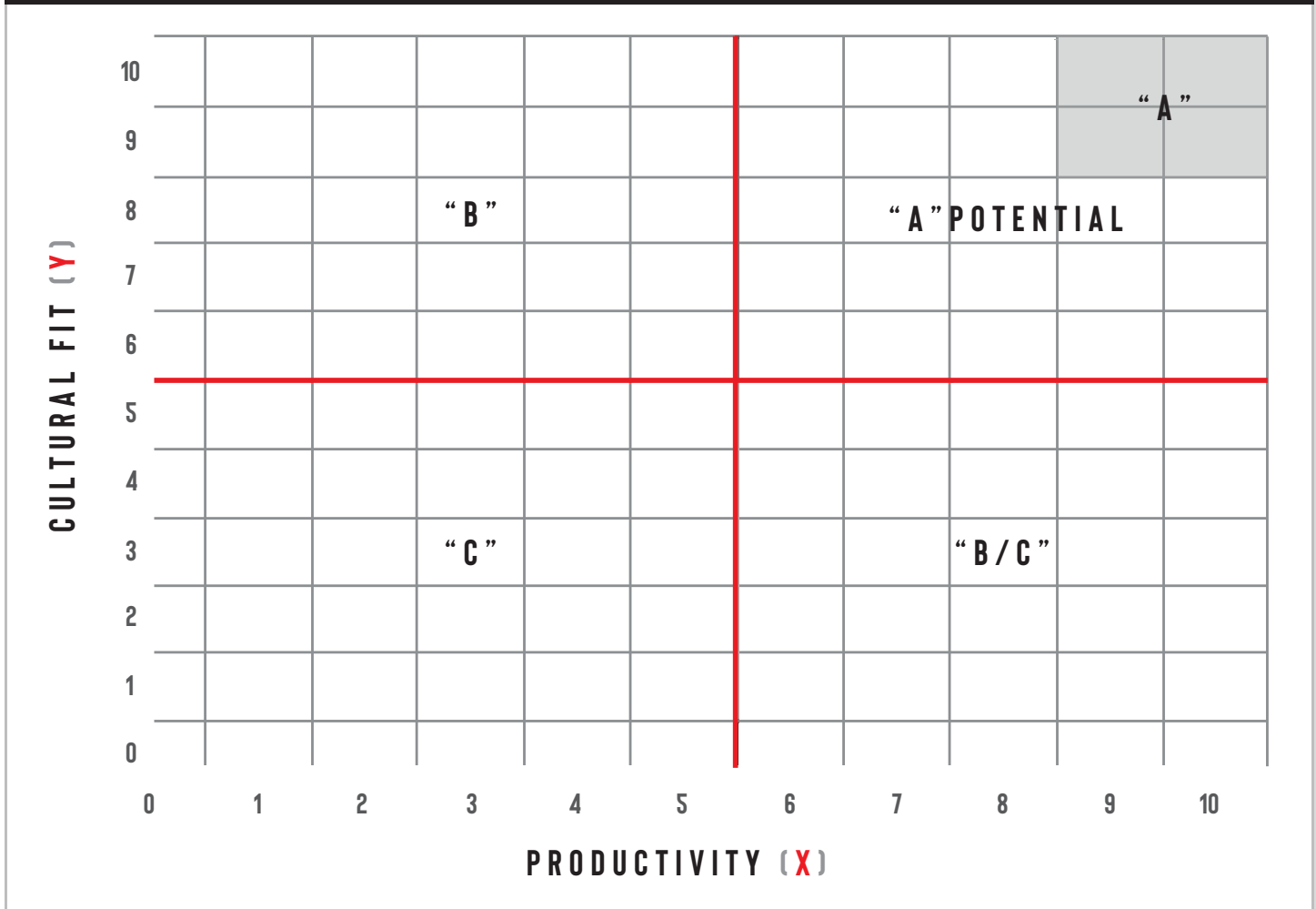
Is Humble & Respectful

Acts with Integrity

Gives First

Is Enthusiastic & Tenacious

TALENT ASSESSMENT CHART



The X-axis measures productivity for their specific role.

The Y-axis measures their cultural fit to the company.

NOTES:



PINNACLE #1 GOAL WORKSHEET



EXAMPLES OF WELL-KNOWN PINNACLES:

JFK'S MOON CHALLENGE: This nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to Earth.

MICROSOFT: A computer on every desk and in every home (It took 40 years).

ELON MUSK—SPACEX:
1. Enable human exploration and settlement of Mars.
2. Harvest asteroids for their estimated 1 trillion in precious metals.

GOOGLE: Organize the world's information to make it universally accessible & useful.

APPLE UNDER STEVE JOBS: Make a contribution to the world by making tools for the mind that advance humankind.

AMAZON: Be earth's most customer-centric company by building a place where people can come to find and discover anything they might want to buy online.

CVS PHARMACY: Be the easiest pharmacy retailer for customers to use.

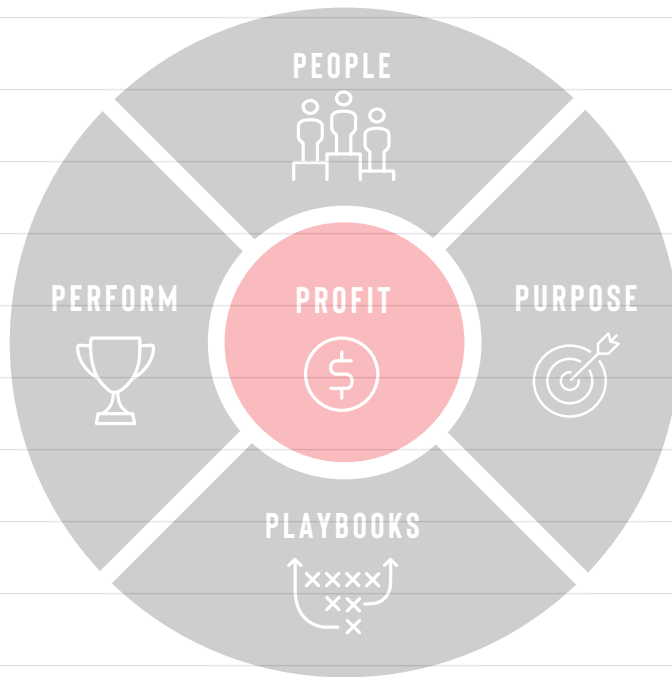
WHAT WOULD YOU DARE TO DREAM IF YOU KNEW, BEYOND A SHADOW OF A DOUBT, THAT YOU COULD NOT FAIL?

WHY IS THIS SO IMPORTANT TO YOU?

HOW WOULD YOU WRITE IT SO IT WAS INSPIRATIONAL AND THE REST OF THE TEAM WOULD WANT TO GET BEHIND IT?

WHAT WOULD THE REVENUE AND PROFIT LOOK LIKE WHEN YOU REACH THAT PINNACLE?





THE STRATEGIC VISION & EXECUTION PLAN

QUARTERLY EXECUTION

Due Date	
Profit	
Revenues	
Key Metric	

QUARTERLY THEME

Theme Name

Celebration / Reward:

Rocks

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

Flywheel Design

Describe and/or sketch your design in this space

One-Phrase Strategy

Brand Promises

Brand Promise KPIs

1		
2		
3		
4		
5		

Strengths:

1. _____
2. _____
3. _____

Weaknesses:

1. _____
2. _____
3. _____



F.A.S.T. ROCK PLANNER



ROCK OWNER:

DUE DATE:

ROCK TITLE:

DESCRIBE THE ROCK. WHAT DOES "DONE" LOOK LIKE?



Why is this ROCK important?

ROCK STEPS

BY DATE	ACTIVITY FOR COMPLETING THE ROCK	DATE COMPLETED
	First Step <input type="checkbox"/>	
	Mid-step <input type="checkbox"/>	
	Mid-step <input type="checkbox"/>	
	Mid-step <input type="checkbox"/>	
	Final Step <input type="checkbox"/>	

LIST RESOURCES NEEDED FOR COMPLETION

ROCK CLIMBING TIPS

1. Start early by identifying any obstacles that need to be overcome and resources needed to complete your Rocks.
2. Set benchmarks and review them in your weekly meetings to ensure that you stay on track.
3. Work as a team, communicate often, hold yourselves and each other accountable and help each other stay on track.
4. Think about the obstacles and how to overcome them. Sprint at the beginning of the quarter so you don't have to sprint at the end.
5. Are you being completely open and honest in your weekly meetings about the progress you're making on your Rocks?
Are you willing to call out a peer if you sense that they're not really on track?

F R E Q U E N T L Y R E V I E W E D , A M B I T I O U S , S P E C I F I C , T R A N S P A R E N T



TACTICAL

It is all about priorities, debates and execution.
Weekly: 90 minutes & replaces the Stand-up that day

What are you not getting from your team that you need from us?

What is not being said that needs to be said?

Who needs our attention this week?

Objective

- Check in on important numbers / Did we “Win the Week?”
- Ensure Quarterly Rocks stay top-of-mind.
- Keep a pulse on our team and our customers.
- Tackle the list—Keep moving up the mountain!

Agenda

- 1. Set the Stage!** First 2-3 minutes is the hook for the movie. Own the field.
- 2. Check-In:** What’s up?
- 3. Scoreboard:**
 - a. Did we “Win the Week?” If so, why or why not?
 - b. It’s not about data, it’s about judgment.
- 4. Rock Review:** Tell us in one sentence each...
 - a. What did you do last week to move this forward?
 - b. What will you do this week to continue to move this forward?
- 5. Accountability from last week:** Who does what, by when?
- 6. Team Engagement:** What did you do this week that was a magical moment for a direct report or team member?
- 7. Business Development / Voice of the Customer:** Brief headlines on Biz Dev. and Voice of the Customer.
- 8. The List of Topics:** Everything that you need this team to hear or help with.
 - a. Decision-making
 - b. Sharing information or having a conversation
 - c. Helping or contributing ideas
 - d. Identifying obstacles that need to be tackled
- 9. Check-Out:**
 - a. Who needs to know what?
 - b. Summarize the priorities for this week.
 - c. Did we have enough healthy conflict and debate? Yes/No
 - d. Did we have a great meeting? Rating 1-6





THE PINNACLE PRINCIPLE

PEOPLE

+

PURPOSE

+

PLAYBOOK

+

PERFORM

=

PROFITS

THE CLIMB

Climbing a mountain is the ultimate metaphor for business growth.

Having a clearly defined strategy is essential. Do you know the route? Have you packed the right tools? Do you know which crevasses to avoid? Have you assembled the best climbers?

If your goal is to get to the summit, you'll need to travel light so you're agile and responsive — but still ready for any storm or a clear climbing window. The peak is not always in sight so you'll need to visualize the goal, keep your plan in mind and pace yourself.

Right now is a good time to double check the current conditions and assemble your team for a tough, new journey. It's never a solo climb. So, you'll need a good guide, the right people in the right boots, the best guidebooks and a willingness to follow in the footsteps of others.

As you know, the final 10% of any journey is when fatigue sets in. Some of the team will want to quit but that's the time to dig in and lead them to the summit.

Like any great climber, you'll need to check your compass and playbook often to achieve your daily elevation gain. When you reach the PINNACLE® together, you'll be rewarded with a spectacular 360-degree view that very few ever see.



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