

OVERVIEW

**Prework:** Strategy & Execution Worksheet. Begin by reviewing your Strategy & Execution Worksheet. Review the details of your analysis, especially any gaps between where they spend money on your products/services and where your relationships are strongest.

**1) Current State.** Start with an assessment of how things are going now in all four quadrants: High-level Needs/Services Alignment and Brand (Yellow), Analytics, Numbers and Money (Blue), Process, Details and Procedures (Green) and Relationships and Feelings (Red). Just write one to three bullets for each quadrant. Refer back to the questions listed in Module 11.

**2) Future Vision.** Think about what future date makes sense to define goals for - typically it's one year from now. Write this down. Use the same 4Q approach to write a couple bullets in each quadrant to describe how you'd like things to look on this date. Focus on what needs to change between the Current State and the Future Vision. Remember to pull in the gaps determined from your Strategy & Execution Worksheet. Refer back to the questions listed in Module 11.

**3) Strategy.** Based on where you are now and where you want to be in the future, determine what 2 to 4 strategic themes you need to emphasize to get from here to there. Having only three strategic themes is desirable.

**4) 90-Day Tactics.** Once you've nailed down the team's strategic themes, you can build the very specific process steps you will need to execute the strategy. Be sure to cover the Why, What, When, Who.

**5) To Don't List.** Once you've come up with new tasks for everyone to perform, it's important to define your To Don't List to free up time to perform the new tasks. Use the four quadrants as a guide to make sure you've covered everything. One or two bullets per quadrant is typically enough.

## 1. CURRENT STATE


A
D  
B
C

## 2. FUTURE VISION


DATE: \_\_\_\_\_

A
D  
B
C

## 3. STRATEGY

## 4. 90-DAY TACTICS

[illegible]

## 5. TO DON'T LIST

The diagram consists of a large rectangle divided into four equal quadrants by a horizontal and a vertical line. The quadrants are colored as follows:

- Top-left quadrant: Light blue background.
- Top-right quadrant: Light orange background.
- Bottom-left quadrant: Light green background.
- Bottom-right quadrant: Light red background.

At the center of the grid, where the four quadrants meet, there is a small circle. This circle is divided into four colored segments, each containing a letter:

- Top segment (blue): Letter A
- Right segment (orange): Letter D
- Bottom segment (red): Letter C
- Left segment (green): Letter B