

## Invitation to Strategic Discipline Momentum Builder

Due to the significance of my health issues that occurred late last February ([Acute Myeloid Leukemia](#) and my subsequent [bone marrow transplant](#)) my doctors have restricted my travel ability. The good news is Rockefeller Habits 4-3-2-1 formula /Gazelles Training is impactful to initiate and develop for your business' success through GoToMeeting Video Conferencing Training. Specifically Positioning Systems Inside Advantage of Strategic Discipline is currently implemented with all my client meetings through GoToMeeting conference calls. For those of you concerned about this approach I would offer you speak to any of my client's to discover how well these meetings have been conducted. I've been fortunate through almost 12 months of chemotherapy treatments and bone marrow recovery process to have only missed one day of client meetings during this time frame.

Meeting in person, with travel expenses will be something I believe is important to do once my health returns, although in most cases this type of travel is reserved for Quarterly and Annual Planning meetings. So while I do not feel meeting you and your team in person is unimportant, the time and place can come in the future to add impact to our meetings.

The benefit for you and your business, you will not pay for travel expenses. Due to my inability to travel this offer includes a substantial discount on the first three months of implementing the Rockefeller Habits 4-3-2-1 formula (with it Positioning Systems Strategic Discipline principles - Priorities, Metrics & Meetings).

The discount for the first three months is 33%. (Provisions can be requested to amortize your investment into an annual agreement. This reduces the your initial investment in getting started, structuring payments for a longer term agreement. If that is of interest to you please let me know.)

The following is a thorough representation of what the Rockefeller Habits-Strategic Discipline Momentum Builder entails.

The Two Days of Initial Workshops - Four Decisions Strategy & Planning Session may be scheduled over 4 half-day sessions as well if this would be more convenient for you and your team.

I'm looking to acquire 3- 4 new clients. To ensure a good fit for both parties my recommendation would be to conduct an initial 30 minute discovery meeting. Should you agree to proceed further we would then establish a 90 minute to 2 hour meeting to review Positioning Systems Four Decisions On-Line Needs Assessment you would complete (with your leadership staff if you'd like to include them) to help determine whether we can meet all of your conditions of satisfaction. There is no cost for these discovery meetings.

# Strategic Discipline Momentum Builder

## The Private Rockefeller Habits Executive Planning and Education Program Delivered by Positioning Systems LLC.

### Two-Day Event Agenda

The Two-Day Event is a comprehensive Planning Session packed with Executive Education. As such, we share the fundamental concepts of The Rockefeller Habits in detail and spend extensive time working through the One-Page Planning process, with large blocks of time for interaction between attending Team Members in this Two-Day format. Your Team will receive superb Executive Education, and it is highly likely - though not guaranteed - you will significantly complete the One Page Strategic Plan for your organization in Two Days.

<p><b>Day One</b> concentrates on People and Strategy, organized around the highly regarded One-Page Strategic Plan document. Topics covered include:</p> <ul style="list-style-type: none"> <li>• Cash Model – how to double your operating cash flow in twelve months.</li> <li>• Market Intelligence – how leading firms "learn faster" to remain ahead of their competitors and to drive priority setting.</li> <li>• People – how to select and hire A players and then avoid demotivating them.</li> <li>• Core Ideology – bringing your core values and core purpose alive to energize your employees and simplify your human resource systems.</li> <li>• BHAG (Big Hairy Audacious Goal) – aligning it with your business fundamentals.</li> <li>• Brand Promise – the key strategic decision that differentiates you from competitors i.e. "if you can't state your strategy in a sentence, you don't get it!"</li> <li>• X Factor – the 10 – 30 times advantage over competitors that helps you dominate your industry and block competitive response.</li> <li>• Annual and Quarterly Focus – the most critical short term decisions an executive team can make to drive alignment and performance.</li> </ul>	<p><b>Day Two</b> centers on Execution and Increasing Cash, organized around the highly regarded one-page Rockefeller Habits checklist. Topics covered include:</p> <ul style="list-style-type: none"> <li>• Rockefeller Habits Checklist – ten essential habits that reduce the executive time needed to manage the business from 50 hours/week to less than 15 hours.</li> <li>• Meeting Rhythm – the daily, weekly, monthly, quarterly, and annual meeting rhythm and the specific agendas that make them effective and practical.</li> <li>• Metrics – the three types of metrics that drive the business on a daily and weekly basis.</li> <li>• Priorities – using daily, weekly, and quarterly themes to drive alignment and focus.</li> <li>• Organizational Structure – the three types of organizational charts and how to apply them to keep everyone accountable.</li> <li>• Themes – how to use them to make your priorities memorable and add energy to your organization.</li> <li>• Increasing Profitability and Cash.</li> </ul>
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- **Pricing:** \$5,000.00 per day for up to 10 Attendee/Participants, plus all travel, venue, Participant meals, lodging and associated costs for the Session, which are invoiced in addition to the daily rate.
- Additional Attendee/Participants beyond 10 in number are charged an added \$500.00 each.

## MORE DETAILS:

Prior to the Two Day Workshop the following meetings and materials should be completed in Advance:

### **CLIENT PREPARATION FOR TWO DAY ROCKEFELLER HABITS WORKSHOP**

#### **1. READ MASTERING THE ROCKEFELLER HABITS**

*It is best if the executive team who will attend the workshop is familiar with the concepts of the Rockefeller Habits. If the team cannot read the whole book by the workshop, require them to read the introduction and Chapter 1.*

#### **2. COMPLETE START, STOP, KEEP, ETC WORKSHEET [EMPLOYEE SURVEY]**

*An employee survey is provided for you to enlist the feedback of your entire staff. Distribute these 2 weeks prior to the workshop and ask the staff to return their completed response to the CEO or supervisor [executive team member] who will be attending the workshop so that they can be reviewed to provide input as to what the companies issues and focus should be as we move ahead with the planning workshop. These should be reviewed prior to the workshop, and where feasible ideas should be acted upon to let the staff know their input was appreciated.*

#### **3. COACH MEET WITH CEO: DISCUSS EXPECTATIONS**

*A questionnaire is provided for the CEO to complete. A meeting at least several days in advance of the workshop should be scheduled to review this information with your coach prior to the workshop taking place. This should allow you to review where you are currently with the company and give the coach insight into which areas will need the most attention in the workshop.*

*Absolutes completed during the 2-Day Workshop include: 3-5 Year Plan, Annual Plan, One Thing for Year and Quarter, Quarterly Plan and SWOT. The remaining elements of the One Page Strategic Plan will be discussed and chosen based on your insights on what your One Thing for 2013 should be. As an example if you feel your One Thing is Execution, then a definite focus on the Rockefeller Habits Checklist will be an element that drives our breakout exercises. Careful pre-planning will help us determine which segments of the One Page Strategic plan will have the most impact for the 2-Day Workshop meetings.*

#### **4. REVIEW MANAGEMENT TEAM WITH COACH**

*At the same meeting where expectations are discussed a short meeting should be conducted on each of the management team. Allowing the coach to understand the dynamics of the group, each executive team's strengths and weaknesses will provide for a better outcome and help the coach conduct the meeting to make sure everyone contributes properly.*

#### **5. PREP FOR WORKSHOP - SCHEDULE OFFSITE MEETING ROOM, LUNCH, BREAKS, ETC.,**

*Meeting should be scheduled off site if at all possible to eliminate distractions, and interruptions. It is important that the executive team understands that they should eliminate all normal day-to-day activities for the length of the workshop. Make them understand that this is going to be like going on a vacation only heavy work concentration. A comfortable meeting room, lunch brought in or at the site with limited breaks and outside contact is a must to keep everyone focused on the outcome of planning for the business. It's important to have 30+ Self Stick Wall Pads [3-M example listed on following page] so notes can be viewed by all participants. 4 multi colored markers should be included for writing. Soft drinks, water, coffee and light snack is recommended for mid-morning and afternoon breaks. Speakers, projector, screen, power strip and any media arrangements should be made with hotel or host site. Configuration for room is best suited for round tables or U-Shape depending on the size of the group that will participate. Ask your Gazelles coach for advice on what room setting will be best for the size of your group. (If you have a meeting room - situation room that allows you the security of eliminating distractions within your current office environment, this can work, although to eliminate distractions, interruptions and the whirlwind activity that usually accompanies being in the office should be the greatest need to ensure focused concentration.*

## ESTABLISHING THE HABIT

This step is crucial to your success. Upon initiation of the Impact 2-Day Rockefeller Habits Strategy & Planning Workshop the following 13 week schedule for implementing Strategic Discipline (priorities, metrics, meetings) would begin as part of this agreement:

### 13 weeks of Meeting Rhythms

- Bi-weekly 30 minute executive leadership meeting (Total 3+ hours/13 wks.)
- Up to 3 training meetings on Daily Huddle (15-30 minutes - up to 1-1/2 hours)
- Weekly Leadership Team Meetings (10) (Total 10+ hours/13 wks.)
- 2 Monthly Meetings (4-8 hours each - Total 8-16+ hours/13 wks.)
- 1 Quarterly Meeting (1-2 Days - Total 8-16+ hours/13 wks.)
- Development of Company, Leadership team and individual dashboards/scorecards (Training for Leadership Team Total 2-3+ hours/13 wks.)
- Theme Development (optional for first 13 weeks) (1-2 hours - Total 1-2+ hours/13 wks. if desired.)

Total for this value of coaching, training and meetings would be investment of **\$29,500.**

Discount for commitment between now and March 31<sup>st</sup>, 2013: **\$19,765\***

**Payments are due the 1<sup>st</sup> of each month, or upon initiation of agreement.**

**Billing split per month:**

**1<sup>st</sup> Month: \$7765\***

**2<sup>nd</sup> Month: \$6000\***

**3<sup>rd</sup> Month: \$6000\***

\* All coaching and training with Positioning Systems comes with our Value Guarantee. If you are not satisfied for any reason with the coaching/training or results of our work generates simply cross off those items on your invoice you feel you did not receive full satisfaction for or simply pay the portion of the invoice (or not pay at all) for the outcome you feel you received.

\*\* An annual agreement can be set up to amortize these levels of payment to a lower investment level. Typically the investment level can be in the \$3000 to \$4000 amount monthly investment depending upon your level of requirement for coaching involvement and meeting times.

