**Execution:** Rockefeller Habits ChecklistTM

|  |
| --- |
| **1.**  **The executive team is healthy and aligned.** |
| [ ]  | Team members understand each other‘s differences, priorities, and styles. |
| [ ]  | The team meets frequently (weekly is best) for strategic thinking. |
| [ ]  | The team participates in ongoing executive education (monthly recommended). |
| [ ]  | The team is able to engage in constructive debates and all members feel comfortable participating. |
| **2. Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move the company forward.** |
| [ ]  | The Critical Number is identified to move the company ahead this quarter.  |
| [ ]  | 3-5 Priorities (Rocks) that support the Critical Number are identified and ranked for the quarter. |
| [ ]  | A Quarterly Theme and Celebration/Reward are announced to all employees that bring the Critical Number to life. |
| [ ]  | Quarterly Theme/Critical Number posted throughout the company and employees are aware of the progress each week. |
| **3. Communication rhythm is established and information moves through organization accurately and quickly.**  |
| [ ]  | All employees are in a daily huddle that lasts less than 15 minutes. |
| [ ]  | All teams have a weekly meeting. |
| [ ]  | The executive and middle managers meet for a day of learning, resolving big issues, and DNA transfer each month. |
| [ ]  | Quarterly and annually, the executive and middle managers meet offsite to work on the 4 Decisions. |
| **4. Every facet of the organization has a person assigned with accountability for ensuring goals are met.** |
| [ ]  | The Function Accountability Chart (FACe) is completed (right people, doing the right things, right).  |
| [ ]  | Financial statements have a person assigned to each line item. |
| [ ]  | Each of the 4-9 processes on the Process Accountability Chart (PACe) has someone that is accountable for them.  |
| [ ]  | Each 3-5 year Key Thrust/Capability has a corresponding expert on the Advisory Board if internal expertise doesn’t exist.  |
| **5. Ongoing employee input is collected to identify obstacles and opportunities.** |
| [ ]  | All executives (and middle managers) have a Start/Stop/Keep conversation with at least one employee weekly.  |
| [ ]  | The insights from employee conversations are shared at the weekly executive team meeting.  |
| [ ]  | Employee input about obstacles and opportunities is being collected weekly.  |
| [ ]  | A mid-management team is responsible for the process of closing the loop on all obstacles and opportunities. |
|  **6. Reporting and analysis of customer feedback data is as frequent and accurate as financial data.** |
| [ ]  | All executives (and middle managers) have a 4Q conversation with at least one end user weekly.  |
| [ ]  | The insights from customer conversations are shared at the weekly executive team meeting.  |
| [ ]  | All employees are involved in collecting customer data.  |
| [ ]  | A mid-management team is responsible for the process of closing the loop on all customer feedback.  |
| **7. Core Values and Purpose are “alive” in the organization.** |
| [ ]  | Core Values are discovered, Purpose is articulated, and both are known by all employees. |
| [ ]  | All executives and middle managers refer back to the Core Values and Purpose when giving praise or reprimands.  |
| [ ]  | HR processes and activities align with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.).  |
| [ ]  | Actions are identified and implemented each quarter to strengthen the Core Values and Purpose in the organization.  |
| **8. Employees can articulate the following key components of the company’s strategy accurately.** |
| [ ]  | Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.  |
| [ ]  | Core Customer(s) – Their profile in 25 words or less.  |
| [ ]  | 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.  |
| [ ]  | Elevator Pitch – A compelling response to the question “What does your company do?”  |
| **9. All employees can answer quantitatively whether they had a good day or week (Column 7 of the One-Page Strategic Plan).** |
| [ ]  | 1 or 2 Key Performance Indicators (KPIs) are reported on weekly for each role/person.  |
| [ ]  | Each employee has 1 Critical Number that aligns with the company’s Critical Number for the quarter (clear line of sight).  |
| [ ]  | Each individual/team has 3-5 Quarterly Priorities/Rocks that align with those of the company.  |
| [ ]  | All executives and middle managers have a coach (or peer coach) holding them accountable to behavior changes.  |
| **10. The company’s plans and performance are visible to everyone.**  |
| [ ]  | A “situation room” is established for weekly meetings (physical or virtual).  |
| [ ]  | Core Values, Purpose and Priorities are posted throughout the company.  |
| [ ]  | Scoreboards are up everywhere displaying current progress on KPIs and Critical Numbers. |
| [ ]  | There is a system in place for tracking and managing the cascading Priorities and KPIs. |