**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. |