



Sales by 5

Rockefeller Habits Checklist

Name _____ Company _____ Date _____

Everyone aligned with #1 thing that needs to be accomplished this quarter to move company forward

- 5 priorities (Rocks) are identified and ranked for the quarter
- A Critical Number is identified and aligns with the #1 priority
- A Quarterly Theme is established that brings the key priority/Critical Number alive
- A scoreboard for the Critical Number is posted and Theme announced
- All employees know what the Celebration/Reward will be

Communication rhythm is established. Information moves through organization accurately and quickly

- All employees are in some kind of a daily and weekly huddle
- Huddles cascade from senior management to frontline or visa versa

Every facet of the organization has a person assigned with accountability for ensuring goals are met

- Income (P&L), Cash Flow, & Balance Sheet statements have persons assigned to each line item
- An accountability chart has been created

Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities

- Employee hassles/ideas/suggestions/issues are being collected weekly
- There is a systematic process for addressing issues and opportunities
- Thank You cards are being written every week by senior management

Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data

- All employees are involved in collecting customer data
- There is a person assigned accountability for customer feedback
- All senior leaders communicate with at least one customer weekly

Core ideologies are "alive" in the organization

- Core ideologies are discovered and defined
- Stories are being shared of employees who represent the ideologies
- Core ideologies are included in appraisal and recognition processes

Clear understanding of the firm's market position drives strategic planning and sales and marketing

- Brand Promise and market (Sandbox) are clearly defined
- The organization is aligned around 5 key strategies (Thrusts/Capabilities) for growth

All employees can report at any time what their productivity is and how it compares against goals

- Smart Numbers (key performance indicators) are identified for the organization
- Weekly measures for each individual/team are clearly displayed and reviewed

A "situation room" is established for the weekly executive team meeting

- Smart Numbers and Critical Numbers are posted bigger than life with goals clearly shown
- Data is presented graphically to help visualize trends
- Core ideologies, priorities, and market maps posted

As goes the Executive Team goes the rest of the firm

- Team members understand each other's differences, priorities, and styles
- The team meets offsite every few months for strategic thinking and renewal
- The team is having fun together