

## GOAL TREE (Strategic plan)

*"I learned about Standards-Based Management as a director at Sauk Prairie Healthcare, where it's been a repeat success. The 1-page 'goal tree' really got my attention. At Culver's, it helped our team get and stay clear on the key issues. The Tree helped us make real progress in every discipline." - Phil Keiser, CEO, Culver Franchising System, Inc.*

### Your future on one page

Traditional strategic planning is based on a 1950's military model with terms like mission, strategy, tactic and objective. The result is often a thick "strategic plan" binder no one uses. The 1-page Goal Tree instead provides focus and maps out how everyone's connected to mission. It lets managers easily communicate where the organization's going.



### The benefits of collaboration

The Center's tools minimize omissions, improve communications and foster collaboration. The 1-page **Goal Tree**:

- Links every goal and project to the organization's mission and vision.
- Keeps everyone, including the board, focused on the top issues
- Traces everyone's paths of delegation and promotion

**Difficulty** Highest

**Estimated time required** 20-30 hours over two months

### Start with your last plan

Start by abstracting your last plan into this 1-page tool. If you don't have one, brainstorm the three key metrics in each discipline and enter them as Performance Goals. Then,

1. Discuss how the goals and metrics relate to each other
2. Brainstorm three key words to characterize each department
3. Set one goal each for growth, efficiency and quality as the Top Goals
4. Use the Dashboard columns to track and report progress
5. Pin up a poster-sized version throughout your workplace!

Members can contact the Center for assistance: [info@theindex.net](mailto:info@theindex.net)

### Make it better

Users should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

# LOGO

## Strategic Plan: 2020-23

**Mission**  
Our springs bring equipment to life. Their reliability and effectiveness serve silently for decades.

**Vision**  
Five years from now, we will have doubled sales and, more important, we will have optimized every aspect of our management, continuing to push the edges of technologies. Family and non-family managers will enjoy a stable organizational design that lets us make timely, well-informed decisions. All our employees will see a life-long career path here with us.

**Top Goals**  
Net margin from 12 to 17.5%  
Repeat sales from 70 to 80%  
Plant retention from 67 to 75%

### Strategies

**1.0 STRUCTURE**  
Diversify, Accelerate, Thrill

**2.0 MARKETING & SALES**  
Diversify, Accelerate, Thrill

**3.0 OPERATIONS**  
Quality, Speed, Cost

**4.0 INFORMATION**  
Data, Discipline, Immediacy

**5.0 HUMAN RESOURCES**  
Inspired, Flexible, Collaborative

**6.0 FINANCE**  
Lasting Investments in Growth

### 2021 Performance Goals

1.1	Improve board self-evaluation score from 4.2 to 4.7
1.2	Reduce compliance issues from 5 to 2
1.3	Introduce 2 new products

2.1	Increase revenue from new products from 5 to 15%
2.2	Improve proposal conversion rate from 67 to 75%
2.3	Decrease customer response from 12 to 4 hours

3.1	Decrease time to quote from 24 to 6 hours
3.2	Increase inventory turns from 5 to 7
3.3	Increase productivity from \$100K COGS/FTE to \$125K

4.1	Reduce management reports from 50 to 10
4.2	Increase Intranet data opens from 100 to 250/month
4.3	Reduce office tech lifecycle from 5 to 3 years

5.1	Reduce plant time to hire from 90 to 45 days
5.2	Increase cross-trained operators from 20 to 50
5.3	Improve rating of family managers to >3.5

6.1	Improve DCR from 1.2 to 1.33
6.2	Reduce COGS from 62 to 59%
6.3	Increase Days Cash in Hand from 180 to 240

### Month $\Delta$ Dashboard

4.5	7%
3	40%
1	50%

10	50%
70	20%
8	50%

24	0%
6	50%
110	40%

35	30%
150	33%
4.5	25%

80	22%
25	16%
3.0	50%

1.2	0%
60	3%
200	33%