

STRATEGIC VISION & EXECUTION PLAN

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**Strategic Planning is worthless –unless
there is first a strategic vision.**

– John Naisbitt



DYBCOACH

PINNACLE BUSINESS GUIDES

THE STRATEGIC VISION & EXECUTION PLAN



PURPOSE: WHY WE EXIST?	PINNACLE: THE TOP OF OUR MOUNTAIN		ANNUAL GROWTH PLAN	
			Due Date	
			Profit	
			Revenues	
			Key Metric	
			Key Metric	
CORE BUSINESS	MILESTONES		GOALS	
	Future Date		1	
	Profit			
	Revenues			
CORE VALUES	<ul style="list-style-type: none">		2	
			3	
			4	
			5	
			6	
			7	
			Trends	

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

THE STRATEGIC VISION & EXECUTION PLAN

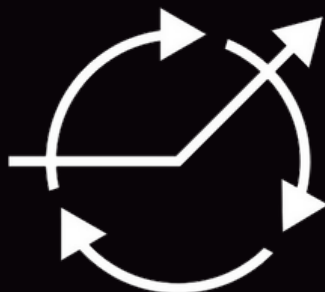


QUARTERLY EXECUTION		QUARTERLY THEME	
Due Date		Theme Name Celebration / Reward:	
Profit			
Revenues			
Key Metric			
Rocks		Flywheel Design <i>Describe and/or sketch your design in this space</i>	
1			
2			
3			
4			
5			
6		One-PhraseStrategy	
7		Brand Promises	
8		Brand PromiseKPIs	
9		1	
		2	
		3	
		4	
		5	
Strengths:		Things To Say No To:	
1. _____		1. _____	
2. _____		2. _____	
3. _____		3. _____	



STRATEGIC INITIATIVES ARE VITAL TO STRATEGIC EXECUTION

While vision tells everyone where they are going, strategy tells everyone how they are going to get there. An excellent business growth strategy outlines a unique path that provides its customers differentiated value relative to its competitors. This is what increases a company's value. However, the sometimes underestimated third element is execution. Execution is what clears the way and puts structures, processes, and capabilities in place to make strategy effective. In our experience, powerful strategies require well-thought-out and well-planned strategic initiatives. Without a commitment to rigorously plan and execute these initiatives, strategic planning and strategy development are, for the most part, a waste of effort.



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THE STRATEGIC VISION & EXECUTION PLAN

(SAMPLE)



PURPOSE: WHY WE EXIST?	PINNACLE: THE TOP OF OUR MOUNTAIN	ANNUAL GROWTH PLAN	
To unlock the potential of our people and lift them up		Due Date	Dec 31, 2024
		Profit	6%
		Revenues	\$117 Million
		Key Metric	Revenue Per Employee
		Key Metric	Profit Per Employee
CORE BUSINESS	MILESTONE	GOALS	
Commercial Preferred General Contractor	Future Date		
	Profit	Dec 31, 2029	
	Revenues	7.5% \$300 Million	
CORE VALUES <ul style="list-style-type: none">Humbly Crush It! We go out everyday and move projects forwardAttitude without Attitude We have a choice to bring a positive attitudeGet In The Ditch Rather than tell people what to do. Demonstrate by coming alongside and working with themSquared Away Keep your work & work area squared away. It's a sign of a true professionalONE Team To our clients and trade partners we are one Team	<ul style="list-style-type: none">Strong Healthy Culture90% of work is negotiatedNew facilityPreferred Trade Partners50% of work is from repeat & referralSuccession Plans in PlaceNo Single Point of Failure or GapsTurnover less than 6%Iconic High Profile ProjectsCracked the code on Profitability	1 People First! Right People in the Right Seats, Doing it Right	
		2 Take the Hill and deliver on our Promises this year	
		3 Tech Up! Master Procore Software	
		4 Sell Like Hell! Play bigger, win more, tell our story better	
		5	
		6	
		7	

Trends

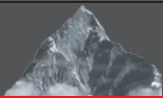
1. Experience Economy
2. Review Society
3. All Things Tech from AI to 3D
4. High Skilled Trades in Short Supply
5. Supply chain issues and delays
6. More red tape in construction



PINNACLE

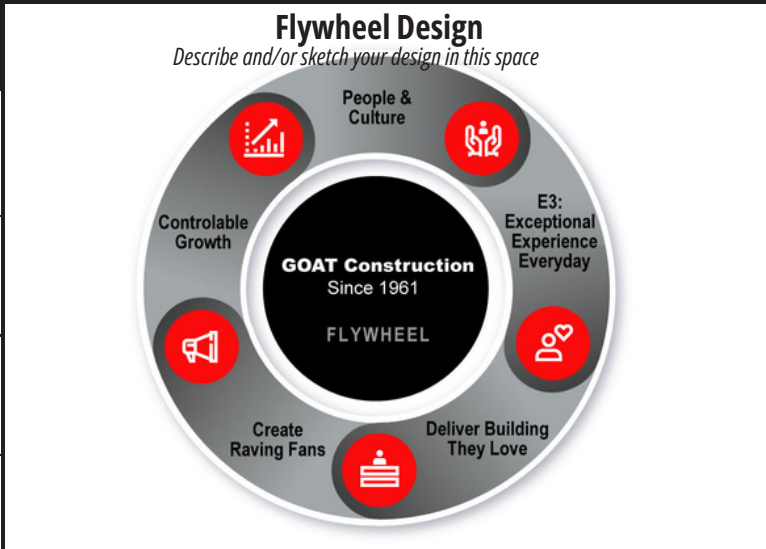
THE STRATEGIC VISION & EXECUTION PLAN

(SAMPLE)



QUARTERLY EXECUTION		QUARTERLY THEME
Due Date	Oct 15, 2024	Theme Name
Profit	6%	Win the Week
Revenues	\$32.5 Million	Celebration / Reward:
Key Metric	Less than \$150K in "Rework"	8+ Win The Week = Family Night at Track

Rocks	
1	Hire two seasoned Project Managers. Julie
2	Cross Train on Estimating top 3 trades. Tom
3	Keep projects on track and act if project starts to drift. Lauren
4	PM & Superintendents to use the daily logs in Procore. Greg
5	Secure \$25 Million in negotiated work within 50 miles of HQ. Benjamin
6	
7	
8	
9	



One-Phrase Strategy	
WOW = Win Our Week	

Brand Promises	Brand Promise KPIs
1 Attention to details	
2 No Surprises	
3 Do what we say	
4 Great Experience	
5	

Strengths:	Things To Say No To:
1. Relationships and Reputation	1. Lots of Competition
2. Trade Partners. 95% Bid our jobs when invited	2. No Niche that we own
3. Tech Savy. Embrace Tech in Construction	3. Recruiting Skilled People Very Difficult

