



Business PERFORM



Purpose

We add value/ help people succeed/achieve/improve through partnerships/working together/stronger together

Why are you driven? Your passion, ultimate achievement and who you serve.



Identity

Respected, enjoyable, trusted/reliable, inspired

How do you want to live your life?



Energy Focus

% % % % %

What are the main focus areas of your life? What is the energy allocation to each?



End Win

Successful growing business on an upward trajectory and in a positive space.

Together we enjoyed achieving our financial results with satisfied customers with the right team and have solid foundations.

What do you want to achieve? When and by what measure?



Critical Elements

Sales : Market pull/ breadth of new clients	Right Team	Financials	Solid Foundations	Customer Satisfaction	Team Engagement
---	------------	------------	-------------------	-----------------------	-----------------

What do you have to achieve in order to achieve The Win?



Must dos

MARGINAL GAINS

Could dos

+ Non-competitive awards	+ Promotion from within.	+ All the numbers :	+ Professional services	+ Repeat business	+ Staff churn
+ Referrals	+ permanent v associate shift	+ revenue,	+ automations in place and used	+ Long term partnerships	+ Satisfaction levels,
+ Broader range of clients	+ Recruitment on track	+ margin,	+ Ops team working well	+ Excellent endorsements, referrals and case studies	+ Energy & effort (discretionary effort)
+ Reduced client concentration	+ Training and development	+ bottom line	+ Underlying infrastructure of the business in place		
+ Voice in the market (Thought leadership..)	+ Complement of skills that reflect to deliver				
+ More multi-year partnerships,	+ Working at the peak of your grade.		+ Timely reporting of simple agreed defined KPIs.		
+ Increased revenue from new sectors (e.g. Local authorities)	+ With the right capacity and head space to focus beyond today.		+ Time and mechanisms to connect		



Business PERFORM

Key timeline moments:

1. Create M'ment presentation (John to create framework, Lucy & Eleanor to populate)
2. Alter weekly rhythm of meetings
3. Hyper focus on sales (rebuild forward pipeline)
4. Set Athena up for success
5. Partner hire decision
6. MBO conversation
7. Comms plan to the business

In parallel:

Lucy create people plan

Eleanor create sales strategy