

# People: One-Page Personal Plan (OPPP)

Name: \_\_\_\_\_

Date: \_\_\_\_\_

		Relationships	Achievements	Rituals	Wealth (\$)
Faith	10–25 Years (Aspirations)				
Family	1 Year (Activities)				
Friends					
Fitness		Start	Start	Start	Start
Finance					
	90 Days (Actions)	Stop	Stop	Stop	Stop

she’s accountable for alerting the team if she senses any potential issues now or later in the year. In turn, Verne, as CEO, maintains the *authority* over cash, signing off on major expenditures and investments. And everyone in the company has *responsibility* for making sure that cash is spent wisely and that deals/contracts are structured so they help generate vs. absorb cash as Gazelles continues to scale up.

But don’t accountability and authority need to be roughly equal — as in “I need sufficient authority if I’m going to be held accountable?” For frontline staff, yes. At a Ritz-Carlton hotel, where the philosophy is that any employee who receives a complaint from a guest “owns” that complaint (accountability), first-line employees such as desk clerks, bellhops, and housekeepers are empowered (authority) to spend up to \$2,000 to handle any customer complaints. Managers can spend up to \$5,000 without additional authorization. A full 250 to 300 hours of first-year training make this possible.

As one moves up the organization into more middle and senior management positions, it’s assumed that this balance of accountability and authority holds. However, those who have advanced up the ranks find that they’ve taken on increasingly more accountability for things they have less and less real control over — until they reach the top and find they are liable (often legally) for anything that goes wrong in an organization that is expanding beyond their day-to-day reach. This is why leaders get paid the big bucks — to bridge this ever-increasing gap between accountability and authority, using their skills of communication, persuasion, education, visioning, etc.

Getting accountabilities clear throughout the organization is crucial. To assist, we have three one-page People tools to help you think through your personal relationship goals; assign specific accountabilities for the company’s functions and business units; and delineate the various process accountabilities in your organization. Working through these will help you identify and prioritize the People challenges on which you need to focus next in scaling up the organization.

## One-Page Personal Plan (OPPP)

People often joke that the best moments of owning a boat were the day they bought the boat and the day they sold it.

There are similar punctuation marks in our lives — the day we’re born and the day we pass away. As busy executives, if we’re not careful, we can find that our personal lives end up as neglected as those vessels forever docked in the harbor (or parked in storage!). Thus, we’re big believers in establishing personal priorities and aligning them with your professional goals.

Just as there are 4 Decisions you make to build a thriving company — People, Strategy, Execution, and Cash — there are parallel areas in your personal life — Relationships, Achievements, Rituals, and Wealth. We encourage each leader of a company to complete a One-Page Personal Plan (OPPP). As with all the one-page tools we’ll detail in this book, you can

## Scaling Up

find a three-quarter-sized copy of the OPPP in the section introduction, or download a full-sized copy at [scalingup.com](http://scalingup.com).

To complete the OPPP, start by filling in the Name and Date spaces at the top. Next, let's walk through the four columns of the OPPP.

### Column 1 — Relationships

In the end, what matters most in life are the depth of your relationships with friends and family; and the sheer number of people you've helped along the way. These represent true measures of wealth. Financial wealth, then, is seen as a resource for fostering your relationships. For an inspirational story about an entrepreneur who used his wealth to help millions, read Conor O'Clery's *The Billionaire Who Wasn't: How Chuck Feeney Secretly Made and Gave Away a Fortune* (you'll also pick up some important tips on scaling up a global business).



**NOTE:** *The list of 5Fs located down the left-hand side of the OPPP — Faith, Family, Friends, Fitness, and Finance — is contributed by James Hansberger. He found, through his decades as a wealth advisor, that what mattered most to those near the end of their life were these 5Fs, in the order they are listed. They serve as a gentle reminder as you set priorities in the OPPP.*

Starting at the top of column 1, list the key groups of people with whom you want a lasting relationship (10 to 25 years). In business, you have a tremendous opportunity to help your employees and customers — so consider adding them categorically to the list. In your personal life, important relationships include family and friends.

Also list the various communities in which you're involved. Ted Leonsis, a Greek-American sports team owner, venture capital investor, filmmaker, and philanthropist, is author of *The Business of Happiness: 6 Secrets to Extraordinary Success in Life and Work*. He notes in his book a strong correlation between happiness and the number of diverse communities in which you are active.

The next step is to look at the groups listed and pick a few key relationships on which to focus your attention for the next 12 months and the next 90 days. Verne took a year to focus on spending more time with his 6-year-old son, Quinn; and one quarter with his sister, who needed support with some health issues.

At the same time, there may be some people in your personal or professional life who are destructive — literally draining the life out of you — and/or distract you from your higher goals. There's a space on the form where you can note relationships you want to end gracefully.

### Column 2 — Achievements

Many CEOs find that even after reaching critical milestones for growing their company, they still feel they haven't made a real difference in the world. The achievements section of the OPPP can pave the way to a more meaningful life. Think about the major ways you'd like to make an impact

through your work *beyond* reaching monetary goals — perhaps by mentoring others or setting up a nonprofit organization — and set objectives in these key areas.

In your personal life, you'll want to think about how you can make a real difference to the key people in your life. For instance, you might aim to have a blissful marriage, instead of just *staying* married, as many people do. Signing on to facilitate the five-year strategic plan for his children's school was an achievement Verne enjoyed prioritizing while writing this book.

The key is focusing on short-, medium-, and long-term achievements relative to the people listed in the relationship column. This might include stopping the pursuit of achievements that are taking you away from the relationships that matter most.

### Column 3 — Rituals

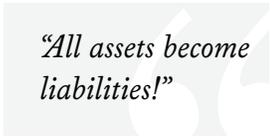
Establishing regular routines in your life will help you achieve your larger goals. Examples of rituals might include planning a weekly date night with your spouse and booking some alone time with each child once a week. For distant family members, you might schedule a regular routine of biannual gatherings.

You might also establish rituals with people whose presence in your life supports your bigger goals. Meeting regularly with a workout buddy; spending time with close friends; participating in a business forum of like-minded leaders; and having a peer coach (a friend who holds you accountable each day — a recommendation by über-executive coach Marshall Goldsmith) are some examples.

And just as there are destructive people with whom you need to end your relationship, there might be some bad habits or behaviors you wish to stop — particularly those that have proved harmful to those around you.

### Column 4 — Wealth

Rather than viewing financial wealth as an end in itself (as a wise guru once told Verne, “All assets become liabilities!”), see it as a resource for supporting the rest of your personal plan. Besides determining how much money you want to set aside for retirement, set goals for the amount of money you want to donate to causes and communities that matter to you over the next several years. Decide how much money you need to support activities with your family and friends, investing in experiences in the coming 12 months that create lasting memories. And note any wealth-producing assets or cash-draining liabilities you need to address in the coming months.



*“All assets become liabilities!”*

Overall, focus on how your wealth will flow through you in the service of others, rather than hoarding it. This seems to attract more wealth — the natural law of reciprocity. Lynne Twist's insightful book titled *The Soul of Money: Transforming Your Relationship With Money and Life* expounds upon this idea.

We hope you find the OPPP a useful planning tool for your life. Let's now turn our focus to the company.

## Scaling Up

### Function Accountability Chart (FACe)

The second one-page People tool — the Function Accountability Chart (FACe) — focuses on making sure you have the right butts in the right seats at the top of the organization (i.e., the “right people doing the right things right”).

An organization is simply an amplifier of what’s happening at the senior level of the company, which is one of the reasons our coaching partners do a quick employee survey as they start working with a business. If the survey reveals that the IT people are upset with marketing, there is likely an issue between those two functional leaders at the top.

The chart lists a common set of functions that must exist in ALL companies. Even start-ups have all these functions, only it’s the founder(s) doing everything! In scaling the business, the idea is to figure out which function on the chart to delegate next.

**People: Function Accountability Chart (FACe)** Gazelles

1. Name the person accountable for each function.  
2. List the four questions at the bottom of the pages: whose name(s) you listed for each function.  
3. List Key Performance Indicators (KPIs) for each function.  
4. Take your Profit and Loss (P/L), Balance Sheet, and Cash Flow accounting statements and assign a person to each line item; then derive appropriate Results/Outcomes for each function.

Functions	1. Person Accountable	2. Leading Indicators (Key Performance Indicators)	4. Results/Outcomes (P/L or B/S items)
Head of Company			
Marketing			
R&D/Innovation			
Sales			
Operations			
Treasury			
Controller			
Information Technology			
Human Resources			
Talent Development/Learning			
Customer Advocacy			
Heads of Business Units			
+			
+			
+			
+			

3. Identify: 1. More than 1 Person in a Seat; 2. Person in more than 1 seat; 3. Empty seats; 4. Enthusiasm Rating?

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Like Shine Lawyers’ Morrison and Roche, who continue to promote and recruit new leadership as the business scales, you want to delegate the functions listed on the FACe tool to leaders who pass two tests (including culture fit):

1. They don’t need to be managed.
2. They regularly wow the team with their insights and output.

The chart asks you to list one or two key performance indicators (KPIs) for each function. These KPIs represent the measurable activities each functional leader needs to perform on a day-to-day basis. The last column on the chart captures the outcomes expected for each function (i.e., who is accountable for revenue, gross margin, profit, cash, etc.). These outcomes normally represent line items on the financial statements.

When completed, this one-page accountability tool helps you diagnose where you have people and performance gaps on the leadership team.

As a general rule, you can move people up or over into these functional positions at any time. However, if you need to bring someone in from the *outside* to fill a senior leadership position, you should do this only once every six to nine months. It takes this length of time to find the right person, get him comfortable in the position, and transfer the DNA of the organization into his psyche. In turn, the new executive will need this amount of time to positively impact the organization enough to pay back his salary.

Now you can afford to bring in another leader. The rule is to take it slow when bringing outsiders into senior leadership roles. The exception is when the company is venture-backed and/or growing 100% a year and needs to bring on three or four key executives within a short period of time.