

Execution: Rockefeller Habits Checklist

1. **As goes the Executive Team goes the rest of the organization.**
 - 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
2. **Everyone aligned with #1 thing that needs to be accomplished this quarter to move 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 staff know what the Celebration/Reward will be
3. **Communication rhythm is established. Information moves thru organization accurately and quickly.**
 - All staff are in some kind of a daily and weekly huddle
 - Huddles cascade from senior management to frontline or visa versa
4. **Every facet of the organization has a person assigned with accountability for ensuring goals are met.**
 - Budget, Cash Flow, & Balance Sheet statements have persons assigned to each line item
 - An accountability chart has been created
5. **Ongoing staff feedback and input is systemized to remove obstacles and identify opportunities.**
 - Staff 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
6. **Reporting and analysis of Client Feedback data is as frequent and accurate as financial data.**
 - All staff are involved in collecting client data
 - There is a person assigned accountability for client feedback
 - All senior leaders communicate with at least one client weekly
7. **Core ideologies are "alive" in the organization.**
 - Core ideologies are discovered and defined
 - Stories are being shared of staff who represent the ideologies
 - Core ideologies are included in appraisal and recognition processes
8. **Clear understanding of the org. 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
9. **All staff 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
10. **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

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