

People (Relationship Drivers)

Employees

- 1 _____
- 2 _____
- 3 _____

Customers

- 1 _____
- 2 _____
- 3 _____

Shareholders

- 1 _____
- 2 _____
- 3 _____

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3 – 5 YRS.) (Where)	GOALS (1 YR.) (What)																																													
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Core Competencies	Profit/X	Brand Promise KPIs	Critical #: People (B/S) 
	BHAG®	Brand Promises	Critical #: Process (P/L) 

Strengths: 1 _____
 2 _____
 3 _____

Weakness: 1 _____
 2 _____
 3 _____

Your Name: _____

Date: _____

Process (Productivity Drivers)

Make/Buy

Sell

Record Keeping

1 _____	1 _____	1 _____
2 _____	2 _____	2 _____
3 _____	3 _____	3 _____

ACTIONS (QTR) (How)	THEME (Qtr/Annual)	YOUR ACCOUNTABILITY (Who/When)																																																																								
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Opportunities: 1 _____ **Threats:** 1 _____

2 _____ 2 _____

3 _____ 3 _____