

## One-Page Exit Strategy

- Simple visualization of:
- Ambition
  - 3-year Goals
  - Where to Play
  - How to Win
  - Strategic Initiatives

## Financials

Standardized set of financial statements, ratios, and templates  
Typically published monthly, with a subset reported weekly

## KPI Scorecards

Standardized view of monthly KPI scorecard  
Weekly production bowler KPIs supplementing financial snapshot

## Summary Objectives

Quarterly summary tying together financial and KPI objectives with key initiatives

## Strategic Initiatives

Project workplans and progress trackers for managing key strategic initiatives

Now that you have the vision and strategic plan, you need to measure progress. Develop Key Performance Indicators (KPIs) for at-a-glance evaluation of growth towards success.

	Measurement	Frequency
Financial	<ul style="list-style-type: none"> <li>Sales</li> <li>Gross margin (%)</li> <li>Revenue</li> <li>EBITDA</li> <li>EBI</li> <li>AR (by Aging)</li> </ul>	<ul style="list-style-type: none"> <li>Weekly (by Sales), Monthly, Quarterly, YTD</li> </ul>
Sales	<ul style="list-style-type: none"> <li>Units</li> <li>Orders</li> <li>Leads</li> </ul>	<ul style="list-style-type: none"> <li>Weekly, Monthly, Quarterly, YTD</li> </ul>
Quality of Operations	<ul style="list-style-type: none"> <li>Production time</li> <li>Production amounts</li> <li>Production Margins</li> <li>Specific business metrics – returns, rejects, warranty jobs...</li> </ul>	<ul style="list-style-type: none"> <li>Daily, Weekly, Monthly, Quarterly</li> </ul>
Resources	<ul style="list-style-type: none"> <li>Open workload</li> <li>Inventory</li> </ul>	<ul style="list-style-type: none"> <li>Monthly, QoQ, YTD</li> </ul>

Initiative Tracking

Milestones	Action Items / Tasks	Owner	Status	Commentary
Milestone 1	Task 1			
	Task 2			
	Task 3			
Milestone 2	Task 1			
	Task 2			
	Task 3			
Milestone 3	Task 1			
	Task 2			
	Task 3			

LEGEND: Complete (Green), On Track (Yellow), Not Started (Grey), Risk of delay (Orange), Delayed (Red)

Putting It All Together

Your One-Page Exit Strategy

Ambition: Purpose: Vision: 3-year Goals

Where to Play: How to Win

Strategic Initiatives: Initiative 1, Initiative 2, Initiative 3, Initiative 4

Measuring Progress - KPIs

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