

STRATEGIC VISION & EXECUTION PLAN

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Strategic Planning is worthless –unless
there is first a strategic vision.

– John Naisbitt



DYBCOACH

PINNACLE BUSINESS GUIDES

THE STRATEGIC VISION & EXECUTION PLAN



| PURPOSE: WHY WE EXIST? | PINNACLE: THE TOP OF OUR MOUNTAIN | ANNUAL GROWTH PLAN | |
|------------------------|-----------------------------------|--------------------|----------|
| | | Due Date | |
| | | Profit | |
| | | Revenues | |
| | | Key Metric | |
| | | Key Metric | |
| CORE BUSINESS | MILESTONES | | GOALS |
| | Future Date | | 1 |
| | Profit | | |
| | Revenues | | |
| | • | | 2 |
| CORE VALUES | • | | |
| • | • | | 3 |
| • | • | | |
| • | • | | 4 |
| • | • | | |
| • | • | | 5 |
| • | • | | |
| • | • | | 6 |
| • | • | | |
| • | • | | 7 |
| • | • | | |
| • | • | | |
| • | • | | |

Trends

1. _____

4. _____

2. _____

5. _____

3. _____

6. _____

THE STRATEGIC VISION & EXECUTION PLAN



QUARTERLY EXECUTION

QUARTERLY THEME

Due Date

Profit

Revenues

Key Metric

Theme Name

Celebration / Reward:

Rocks

1

2

3

4

5

6

7

8

9

Flywheel Design

Describe and/or sketch your design in this space

One-Phrase Strategy

Brand Promises

Brand Promise KPIs

1

2

3

4

5

Strengths:

1. _____

2. _____

3. _____

Things To Say No To:

1. _____

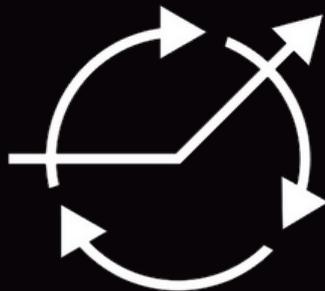
2. _____

3. _____



STRATEGIC INITIATIVES ARE VITAL TO STRATEGIC EXECUTION

While vision tells everyone where they are going, strategy tells everyone how they are going to get there. An excellent business growth strategy outlines a unique path that provides its customers differentiated value relative to its competitors. This is what increases a company's value. However, the sometimes underestimated third element is execution. Execution is what clears the way and puts structures, processes, and capabilities in place to make strategy effective. In our experience, powerful strategies require well-thought-out and well-planned strategic initiatives. Without a commitment to rigorously plan and execute these initiatives, strategic planning and strategy development are, for the most part, a waste of effort.



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PINNACLE BUSINESS GUIDES



THE STRATEGIC VISION & EXECUTION PLAN

(SAMPLE)



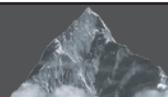
| PURPOSE: WHY WE EXIST? | PINNACLE: THE TOP OF OUR MOUNTAIN | | ANNUAL GROWTH PLAN | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------|----------------------|-----------------------------------------------------------------------|--|
| To unlock the potential of our people and lift them up |  | | Due Date | Dec 31, 2024 | | |
| | | | Profit | 6% | | |
| | | | Revenues | \$117 Million | | |
| | | | Key Metric | Revenue Per Employee | | |
| | | | Key Metric | Profit Per Employee | | |
| CORE BUSINESS | MILESTONE | | GOALS | | | |
| Commercial Preferred General Contractor | Future Date | | 1 PeopleFirst! Right People in the Right Seats, Doing it Right | | | |
| | Profit | Dec 31, 2029 | | | | |
| | Revenues | 7.5% \$300 | 2 Take the Hill and deliver on our Promises this year | | | |
| Million | | | | | | |
| CORE VALUES | <ul style="list-style-type: none"> • Strong Healthy Culture • 90% of work is negotiated • New facility • Preferred Trade Partners • 50% of work is from repeat & referral • Succession Plans in Place • No Single Point of Failure or Gaps • Turnover less than 6% • Iconic High Profile Projects • Cracked the code on Profitability • • • | | 3 Tech Up! Master Procore Software | | | |
| <ul style="list-style-type: none"> • Humbly Crush It! We go out everyday and move projects forward | | | | | 4 Sell Like Hell! Play bigger, win more, tell our story better | |
| <ul style="list-style-type: none"> • Attitude without Attitude We have a choice to bring a positive attitude | | | 5 | | | |
| <ul style="list-style-type: none"> • Get In The Ditch Rather than tell people what to do. Demonstrate by coming alongside and working with them | | | | | 6 | |
| <ul style="list-style-type: none"> • Squared Away Keep your work & work area squared away. It's a sign of a true professional | | | 7 | | | |
| <ul style="list-style-type: none"> • ONE Team To our clients and trade partners we are one Team | | | | | | |
| <ul style="list-style-type: none"> • | | | | | | |

Trends

- | | |
|-----------------------------------------|-----------------------------------------------|
| 1. <u>Experience Economy</u> | 4. <u>High Skilled Trades in Short Supply</u> |
| 2. <u>Review Society</u> | 5. <u>Supply chain issues and delays</u> |
| 3. <u>All Things Tech from AI to 3D</u> | 6. <u>More red tape in construction</u> |

THE STRATEGIC VISION & EXECUTION PLAN

(SAMPLE)



QUARTERLY EXECUTION

| | |
|------------|------------------------------|
| Due Date | Oct 15, 2024 |
| Profit | 6% |
| Revenues | \$32.5 Million |
| Key Metric | Less than \$150K in "Rework" |

QUARTERLY THEME

Theme Name

Win the Week

Celebration / Reward:

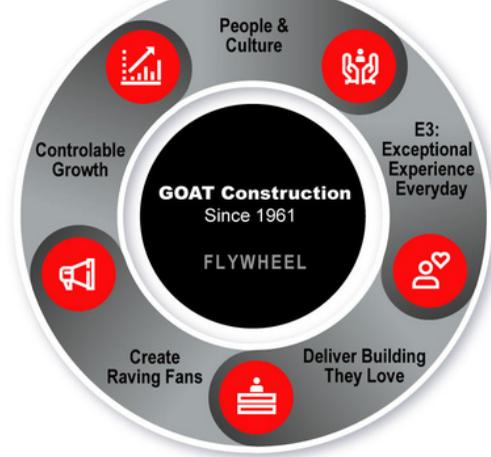
8+ Win The Week = Family Night at Track

Rocks

- 1 Hire two seasoned Project Managers. Julie
- 2 Cross Train on Estimating top 3 trades. Tom
- 3 Keep projects on track and act if project starts to drift. Lauren
- 4 PM & Superintendents to use the daily logs in Procore. Greg
- 5 Secure \$25 Million in negotiated work within 50 miles of HQ. Benjamin
- 6
- 7
- 8
- 9

Flywheel Design

Describe and/or sketch your design in this space



One-Phrase Strategy

WOW = Win Our Week

Brand Promises

Brand Promise KPIs

- 1 Attention to details
- 2 No Surprises
- 3 Do what we say
- 4 Great Experience
- 5

Strengths:

1. Relationships and Reputation
2. Trade Partners. 95% Bid our jobs when invited
3. Tech Savy. Embrace Tech in Construction

Things To Say No To:

1. Lots of Competition
2. No Niche that we own
3. Recruiting Skilled People Very Difficult