



PINNACLE

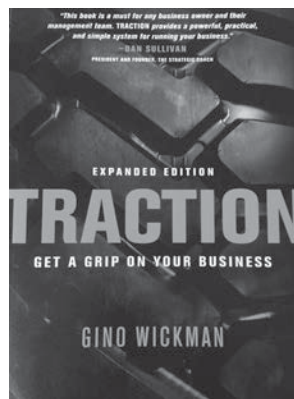
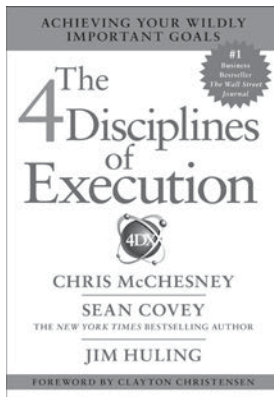
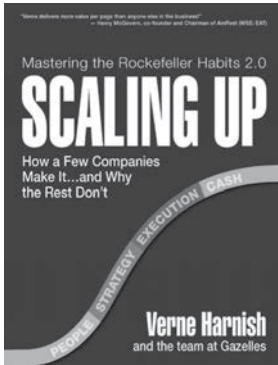
BUSINESS GUIDES

STRATEGIC GUIDANCE FOR BUSINESS GROWTH

POWERED BY YOU



CHOOSING AN OPERATING SYSTEM



DESCRIPTION	E MYTH	GREAT GAME OF BUSINESS	SCALING UP	EOS	4 DISCIPLINES OF EXECUTION
RIGHT PEOPLE IN RIGHT SEATS	●	○	●	●	●
HIRING / RECRUITING "A PLAYERS"	○	○	●	●	●
FUNCTIONAL ACCOUNTABILITY	●	○	●	●	●
PROCESS ACCOUNTABILITY	●	●	●	●	●
VISION & PURPOSE	●	○	●	●	●
STRATEGY	●	●	●	○	●
PLANNING	●	●	●	●	●
BUSINESS DEVELOPMENT	●	○	●	●	●
MARKETING / BRANDING	●	○	●	●	○
OPERATIONS EXECUTION	●	●	●	●	●
PROCESS IMPROVEMENT	●	●	○	●	●
ROCKS / GOALS	●	●	●	●	●
DATA / SCORECARD	●	●	○	●	○
SCOREBOARD— WIN THE WEEK	○	○	●	○	●
TEAM HEALTH	○	○	●	●	●
CASH MANAGEMENT	●	●	●	○	○
OPEN BOOK MANAGEMENT	○	●	●	●	●
PROFIT TOOLS	●	○	●	○	○
STICKY TERMS	○	○	●	○	●
ENJOYABLE TO IMPLEMENT	●	●	●	●	●
LEADERSHIP DEVELOPMENT	●	●	●	●	●
FLEXIBILITY TO CUSTOMIZE TO CLIENT	●	●	●	○	●

GRADE:



WEAK



GOOD



BETTER



BEST

*"If you want to go fast go alone,
if you want to go far go together."*

- Unknown





A NEW APPROACH

What if there were a different path?

Instead of discovering the latest *“Business Operating System,”* you choose a Guide focused on your growth. Your Guide becomes roped in with your leadership team. And instead of using a “one size fits all system,” they provide a series of world-class tools customized to help you get up your business mountain.

Of course, a path is already there. Nearly every business mountain has been conquered. The footprints are in the snow. You won’t take the exact path, but will use those successes to build a powerful team of people, lead them with a passionate purpose and create a playbook that will optimize performance and profits.

PINNACLE® is an evolution. We’ve packed up some of the finest business tools on the planet—all curated from hundreds of time-tested books, proven systems and concepts—then custom designed for your unique climb—all to help you gain the highest impact in the shortest amount of time.

At PINNACLE® we’ve hiked in your boots. We’ve been climbing some serious business mountains for over 30 years. We’ve also spent the past decade in classrooms learning, and teaching leadership teams how to implement growth. It’s not an easy journey, but in the end the view is incredible.

Let’s climb!

Your Pinnacle Guides



THE PINNACLE PRINCIPLE

PEOPLE

+

PURPOSE

+

PLAYBOOK

+

PERFORMANCE

=

PROFITS



PEOPLE - THE RIGHT WHOS



TALENT ASSESSMENT

How many "A Players" or "A Potential Players" do you have?



FUNCTIONAL ACCOUNTABILITY

Who owns what function drives clarity and accountability.



PROCESS ACCOUNTABILITY

Processes cross many departments.
Who owns each of your core processes?
For example Client Experience?



TEAM HEALTH

Get all the people rowing
in the same direction to dominate
your competition—anytime.

▲ ***We expected that good-to-great leaders would begin by setting a new vision and strategy. We found instead that they first got the right people on the team, the wrong people off the team, and the right people in the right seats.***

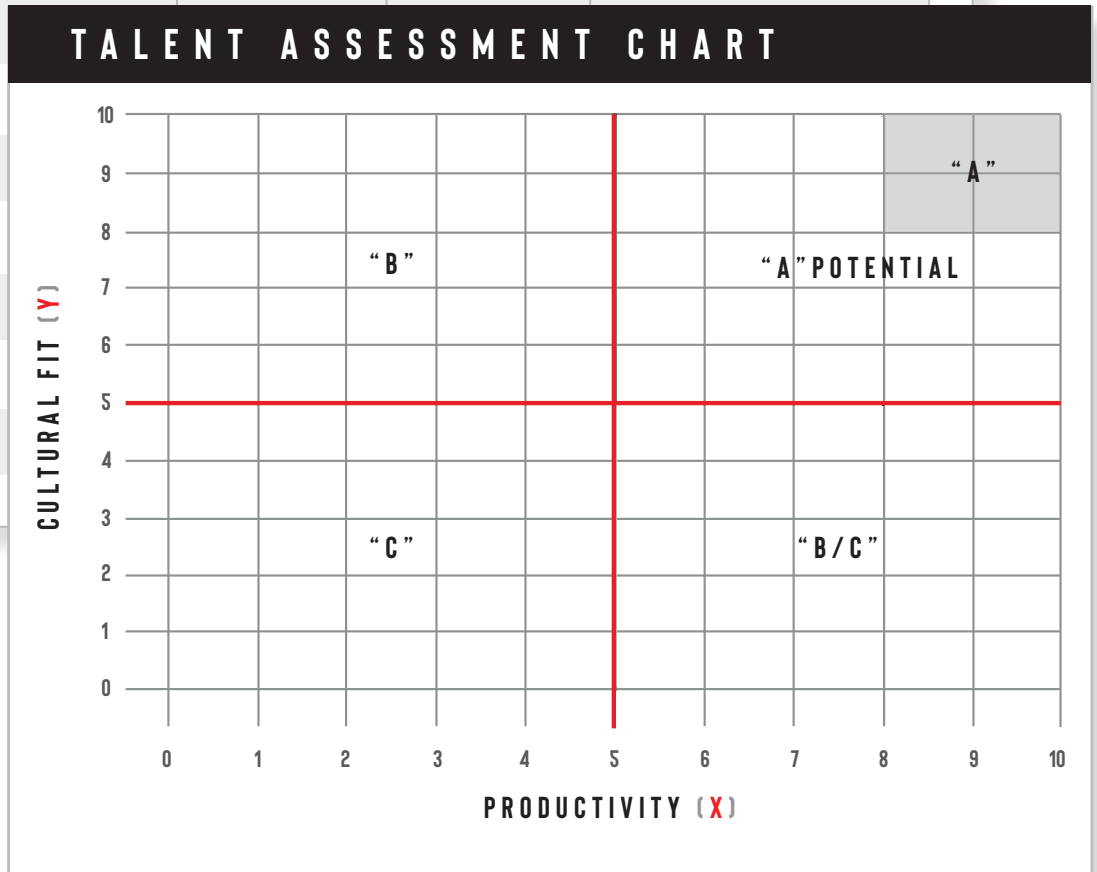
– James C. Collins, *Good to Great*



TEAM TALENT ASSESSMENT EXERCISE

Enter the initials of your team members. For each team member, assign their Cultural Fit Score (0-10) based on how well they live and exemplify our Culture and their Productivity Score (0-10) based on how well they deliver results for their specific role. Next, plot them on the graph on page two below. Hold on Rating for now until after you plot on the chart. Finally, determine any action or coaching required.

TEAM MEMBER INITIALS	CORE VALUE SCORE (0-10)	PRODUCTIVITY SCORE (0-10)	RATING: A, B, B/C, C	ACTION PLAN FOR NEXT QUARTER



The X axis measures productivity for their specific role.
The Y axis measures cultural fit.

FUNCTIONAL ACCOUNTABILITY CHART

- 1 Using your profit and loss, balance sheet and cash flow statements assign a person to each line item. Then derive appropriate results/outcomes for each function.
- 2 List Key Performance Indicators (KPIs) for each function.
- 3 Name the person accountable for each function
- 4 Ask the questions below the chart, for each names listed for each function

FUNCTIONS	3 PERSON ACCOUNTABLE	2 KPIs	1 RESULTS/OUTCOMES <small>(PL OR B/S)</small>
Visionary			
CEO			
Marketing			
Sales			
Operations			
Treasury			
Controller			
Technology			

- 4 Identify:**
1. More than one person in a seat?
 2. Person in more than one seat?
 3. Empty seats?
 4. Enthusiastically rehire?



PURPOSE - WHY DO WE EXIST? WHERE ARE WE HEADED?



STRATEGY

How are you different?



VISION & PLAN

This is the two-page map of how and when we will get to the summit.



BRAND MESSAGE

We are storytellers. What problem are you solving for whom.



CODIFIED CULTURE

How to bring your culture to the next level.

▲ ***“Strategy is about setting yourself apart from the competition. It’s not a matter of being better at what you do—it’s a matter of being different at what you do.”***

– Michael E. Porter, *What Is Strategy?*



STRENGTH TEST YOUR STRATEGY

MOUNTAIN NAME:

WORDS YOU OWN (MINDSHARE): Think Products or Services that you created or deliver to your clients

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

SANDBOX & BRAND PROMISES:

WHO/WHERE (CORE CUSTOMERS)	WHAT (PRODUCTS & SERVICES)	BRAND PROMISES	KPIs
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

BRAND PROMISE GUARANTEE (CATALYTIC MECHANISM):

ONE-PHRASE STRATEGY (KEY TO MAKING MONEY):

DIFFERENTIATING ACTIVITIES (3-5 HOWS):

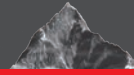
X-FACTOR (1x - 10x UNDERLYING ADVANTAGE):

PROFIT PER X (ECONOMIC ENGINE):

PINNACLE (7-10 YEAR GOAL):

_____	_____
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TRENDS, WEAKNESSES & STRENGTHS



TRENDS

What are changes in technology, distribution, product innovation, markets, consumer, social trends that might impact your industry and organization?

STRENGTHS/CORE COMPETENCIES

What are the strengths of the organization that have been the source of your success?

WEAKNESSES

What are the weaknesses of the organization that aren't likely to change?



PLAYBOOK - ARE YOU PLAYING TO WIN OR PLAYING NOT TO LOSE?



CORE PROCESSES SIMPLIFIED INTO CHECKLISTS

Process takes pressure off people.



PRACTICE SCHEDULE

Practice the very best way
to perform a process until it is
repeatable for you and the client.



MEETING STRUCTURES

How we get things done and
keep everything on track &
held together.



FAST ROCKS

GET ALIGNMENT AND WORK DONE

Annual & Quarterly goals to move the
business forward the fastest.

▲ ***“Name one professional coach who would hand over their playbook to the other team. It just doesn’t happen.”***

– Greg Cleary, PINNACLE



WHETHER WE LIKE IT OR NOT, MEETINGS ARE THE CLOSEST THING TO AN OPERATING ROOM, A PLAYING FIELD OR STAGE WE HAVE.

PINNACLE MEETING STRUCTURES

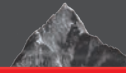
ESSENTIAL MEETINGS

- ✓ Standup (Daily)
- ✓ Tactical (Weekly)
- ✓ Financial & Rock Accountability (Monthly)
- ✓ Strategic Lookout (Quarterly)
- ✓ Strategic Vision & Planning Summit (Annually)

NEXT-LEVEL MEETINGS

- ✓ Focused One Topic (As Required)
- ✓ Bivouac Break (Find Your Cadence)
- ✓ All Hands (Quarterly)
- ✓ Alignment at the Top (Find Your Cadence)
- ✓ Coaching Conversation (Quarterly)

F.A.S.T. ROCK PLANNER



ROCK OWNER:

DUE DATE:

ROCK TITLE:

DESCRIBE THE ROCK AND IS IT FAST?

Blank space for describing the rock and its FAST status.



Why is this ROCK important?

Blank space for explaining the importance of the rock.

ROCK STEPS

BY DATE	ACTIVITY FOR ACHIEVING THE ROCK	DATE COMPLETED
	First Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Mid Step <input type="checkbox"/>	
	Final Step <input type="checkbox"/>	

LIST RESOURCES NEEDED FOR COMPLETION

Blank space for listing resources needed for completion.

ROCK CLIMBING TIPS

1. Start early by identifying any obstacles that need to be overcome and resources you need to complete your Rocks.
2. Set benchmarks and review them in your Weekly Meetings to ensure that you stay on track.
3. Work as a team, communicate often, hold ourselves and each other accountable and help each other stay on track.
4. Think about the obstacles & how to overcome them. Sprint at the beginning of the Quarter so you don't have to sprint at the end.
5. Are you being completely open and honest in your weekly Meetings about the progress you're making on your Rocks?
And, are you willing to call out a peer if you sense that they're not really on-track ?

FREQUENTLY REVIEWED, **A**MBITIOUS, **S**PECIFIC, **T**RANSSPARENT?



PERFORMANCE - WIN YOUR WEEK



SCOREBOARD

DID WE WIN THE WEEK?

Every sporting event has a Scoreboard and everyone knows who is winning.



THE POWER OF ONE

1% improvements in key areas and 1 person making it better.



PROFITS FIRST DISCIPLINE

Change your approach from
Sales - Expenses = Profits to
Sales - Profits = Expenses!



FLYWHEEL CONCEPT

KEEP MOMENTUM ON YOUR SIDE.

Better, Cheaper, Faster, over and over
until the business almost runs itself.

▲ ***"Most people overestimate what they can do in one year
and underestimate what they can do in ten years."***

- Bill Gates



THE POWER OF ONE - CASH

THE POWER OF ONE

NET CASH FLOW \$

EBIT \$

Your Current Position

YOUR POWER OF ONE

Change you would like to make

Annual Impact on Cash Flow \$

Impact on EBIT \$

Price Increase %	%		
Volume Increase %	%		
COGS Reduction %	%		
Overhead Reduction %	%		
Reduction in Debtors Days	day(s)		
Reduction in Stock Days	day(s)		
Increase in Creditors Days	day(s)		

YOUR POWER OF ONE IMPACT

THE POWER OF ONE

NET CASH FLOW \$

EBIT \$

Your Adjusted Position

▲ **“Profit is like oxygen, food, water and blood for the body, they are not the point of life, but without them, there is no life.”**

– James C. Collins

PROFIT FIRST INSTANT ASSESSMENT

INSTRUCTIONS

- STEP 1** Identify your company's Real Revenue* for the last 12 months.
- 2** Pick the column that corresponds to your real revenue in Figure 1.
- 3** Complete the Actual column in Figure 2 with your actual numbers for the last 12 months.
- 4** Using the percentages identified in Step 2, fill out the PF% in Figure 2.
- 5** Multiply the Real Revenue number in the Actual column with each PF% and enter the resultant number in the corresponding PF\$ row.
- 6** For each row, subtract the PF\$ number from the Actual number and put the result in the corresponding row in The Bleed column. *Note: You may get negative numbers.*
- 7** For the Fix column put the word “Increase” if the corresponding The Bleed row is a negative number and the word “Decrease” if it is a positive number.

***Real Revenue** – Real Revenue is the income generated by your company after subtracting the cost of materials and subcontractors. This is similar to Gross Profit, but does not include your employee labor. The total income of a service business is typically its Real Revenue. The total income for a retailer, manufacturer or agency (with many subcontractors) typically need to adjust the total income to Real Revenue.

	A	B	C	D	E	F
Real Revenue Range	\$0 – \$250K	\$250K – \$500K	\$500K – \$1M	\$1M – \$5M	\$5M – \$10M	\$10M – \$50M
Real Revenue	100%	100%	100%	100%	100%	100%
Profit	5%	10%	15%	10%	15%	20%
Owner's Pay	50%	35%	20%	10%	5%	0%
Tax	15%	15%	15%	15%	15%	15%
Operating Expenses	30%	40%	50%	65%	65%	65%

RESULT – The completed Instant Assessment tells you what you need to do with your allocation of money (either Increase or Decrease) and by how much (specified in The Bleed column) for each account.

	ACTUAL	PF%	PF\$	THE BLEED	THE FIX
Top Line Revenue					
Material & Subs					
Real Revenue		100%			
Profit					
Owner's Pay					
Tax					
Operating Expenses					



THE STRATEGIC VISION & EXECUTION PLAN			
PURPOSE: WHY WE EXIST?	PINNACLE: THE TOP OF OUR MOUNTAIN		GOALS (1 YR.)
			Due Date
			Profit
			Revenues
			Rev./Emp.
			GOALS
CORE VALUES/PRINCIPLES <small>(SHOULD/SHOULDN'T)</small>	MILESTONES (3-5 YRS.)		1
	Future Date		2
	Profit		3
	Revenues		
			4
			5
BEHAVIORS <small>To Live Values & Purposes</small>	BRAND PROMISES		BRAND PROMISE KPIs
1			
2			
3			
STRENGTHS/CORE COMPETENCIES		WEAKNESSES:	
1. _____		1. _____	
2. _____		2. _____	
3. _____		3. _____	
 PINNACLE			

1



THE STRATEGIC VISION & EXECUTION PLAN

QUARTERLY EXECUTION

Due Date

Profit

Revenues

Rev./Emp.

Rocks

1

2

3

4

5

6

7

8

9

Trends

1. _____

2. _____

3. _____

QUARTERLY THEME

Theme Name

Celebration / Reward.

Scoreboard Design

Describe and/or sketch your design in this space

One Line Marketing Phase

Brand Promises

Brand Promise KPIs

1

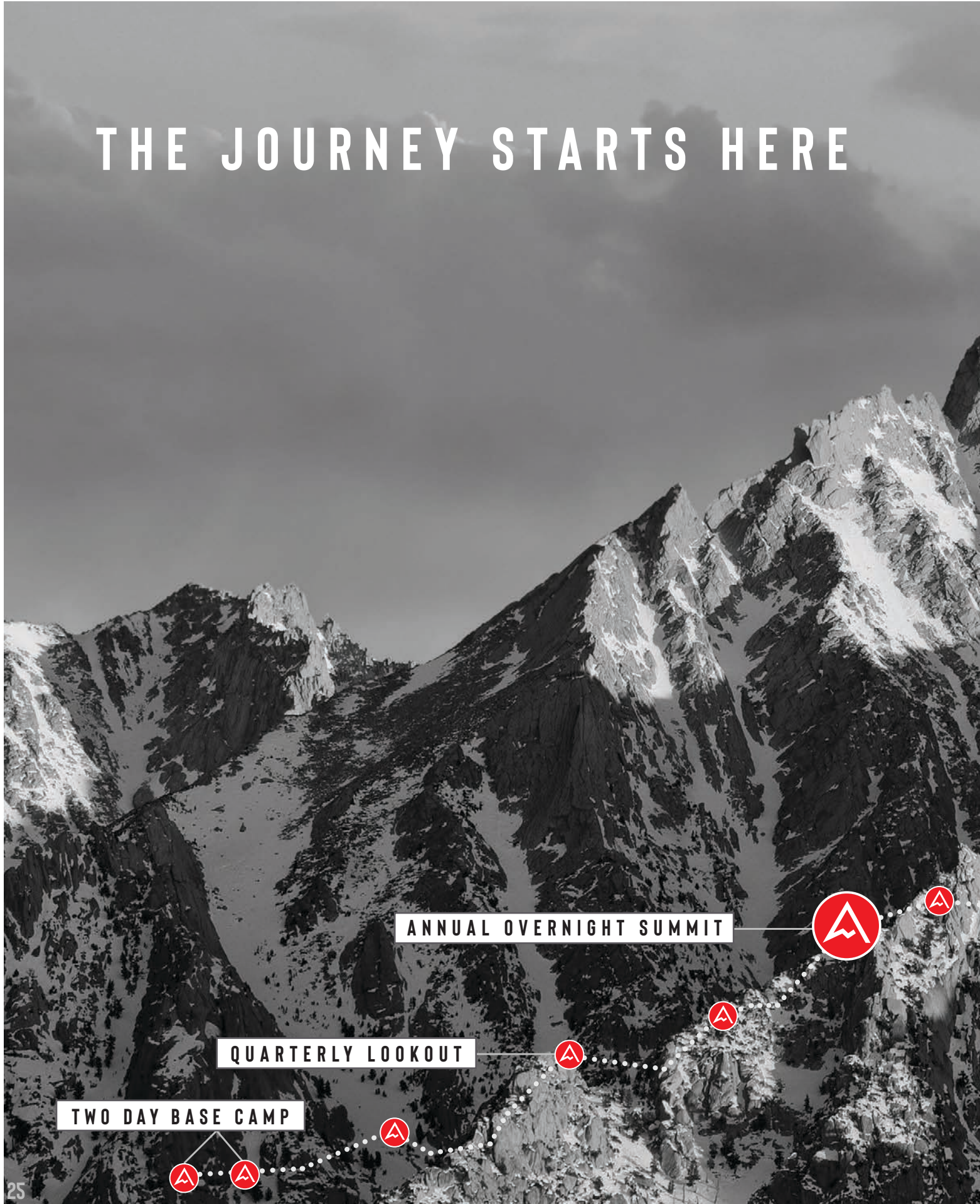
2

3

4

5

THE JOURNEY STARTS HERE



TWO DAY BASE CAMP

QUARTERLY LOOKOUT

ANNUAL OVERNIGHT SUMMIT

THE PINNACLE



3-5 YEAR MILESTONES



ANNUAL OVERNIGHT SUMMIT



QUARTERLY LOOKOUT





BASE CAMP DAY ONE

OBJECTIVES:

- ▲ Begin to envision a new bolder future
- ▲ Get started on WHO, WHY & WHERE
- ▲ Deploy Essential Business Tools

AGENDA

1. **The Journey** – What’s ahead on the trail before arriving at the PINNACLE of your mountain?
2. **WHO First?**
 - a. Process Accountability Chart (Get Work, Do Work, Get Paid)
 - b. Talent Assessment
 - c. Functional Outcomes Accountability Chart
3. **Codified Culture**
 - a. Core Values – Did we get them right?
 - b. Do we know what good looks like?
 - c. Top 3 behaviors
4. **Assess the current Environment** with Trends, Weaknesses & Strengths
5. **Strength Test** our current Strategy
6. **The PINNACLE.** (#1 Goal)
7. **First Steps:** Set “Scramble” Rocks
8. **Meeting Structures** – Standup
9. **Next steps** and clear expectations agreed
10. **Head out** One team, clear goal, simplify, get to Base Camp Day Two



MY JOURNEY

JOHN FULWIDER
PINNACLE GUIDE, FOUNDER

WHY DO COMPANIES CLIMB WITH ME?

1 They want to be in a **"Category of One"** in their industry.



18% Not just theory—18% average growth rate.

14 For over 14 years I've helped guide, teach, coach clients up their personal and business mountains.

100% 100% of them are convinced there is a **Next Level** for them and want my help to get there.

35+ I've spent my entire career helping over 35 companies reach for the PINNACLE.

gear80



2

YOUR TWO OBJECTIVES

1. Would the PINNACLE approach to business systems be right for you?

- Yes
- No
- I have a few more questions.

2. Would I be a good fit as your team guide?

- Yes
- No
- I have a few more questions.

We believe in taking clients to the summit, and more importantly, helping them actually enjoy the climb. This isn't about theory. It's about action and results – and celebrating milestones on the way up. PINNACLE® is an exclusive new framework that's only available to our demanding clients.

CLIENTS ENJOYING THEIR CLIMB



THE CLIMB

Climbing a mountain may be the ultimate metaphor for business growth.

Having a clear defined strategy is essential. Do you know the route? Have you packed the right tools? Do you know which crevasses to avoid? Have you assembled the best?

If your goal is to get to the summit, you'll need to travel light so you're agile and responsive —but still ready for any storm or clear climbing window. The peak is not always in sight so you'll need to visualize the goal, keep your plan in mind and pace yourself.

Right now is a good time to double check the current conditions and assemble your team for a tough new journey. It's never a solo climb. So you'll need a good guide, the right people in the right boots, the best guidebooks and a willingness to follow in the footsteps of others.

As you know, the final 10% of any journey is when fatigue sets in. Some of the team will want to quit, but that's the time to dig in and lead them to the summit.

Like any good climber, you'll need to check your compass and playbook often to achieve your daily elevation gain. When you reach the PINNACLE® together, you'll be rewarded with a spectacular 360-degree view that very few ever see.



PINNACLE
BUSINESS GUIDES

PINNACLEBusinessGuide.com