

Setting the Vision



Purpose



Values



Mission



Workbook

Setting the Vision

Vision

The purpose of this ebook is to help you begin to become the CEO that you need to be for your business.

“The function of leadership — the number-one responsibility of a leader — is to catalyze a clear and shared vision for the company and to secure commitment to and vigorous pursuit of that vision. ...This is a universal requirement of leadership, and no matter what your style, you must perform this function.”

- Jim Collins

As Jim Collins suggests, your number one responsibility as a leader is to create a powerful shared vision and is an absolute in necessity to growing your business to new heights.

Workbook

This workbook is designed to help you work through the three key elements of a company vision as described by Jim Collins:

Values - The guiding philosophy that governs your teams behaviors. It is the “How” you do business.

Purpose - Purpose is the fundamental reason for your companies existence. It is the “Why” you do business.

Mission - Is a clear and compelling goal that all efforts are driving toward, a BHAG. It is the “What” we are up to for the next 3-5 years.

Follow along and dig deep into these activities to begin to create the vision your company needs and to lay the foundation for massive growth.

Notes:



Purpose

Discovering your companies purpose is the first step on the path to creating a transformative vision for your company. Jim Collins describes a companies purpose as following:

Purpose is the fundamental reason for your company's existence — its ultimate reason for being. Your company's purpose dovetails with the sense of personal purpose that you and other members of the company hold deep within you, and thereby provides meaning to work.

A crucial aspect of purpose is that it's always worked towards, but never fully achieved, like chasing the earth's horizon or pursuing a guiding star. The enduring aspect of purpose is well illustrated by Steve Jobs, co-founder of Apple and founder of NeXT:

"I don't feel that I'll ever be done. There are lots of hurdles out there, and there's always a hurdle that I'll never reach in my lifetime. The point is to keep working toward it."

At Infusionsoft our purpose is to "help small businesses succeed", as you can see our purpose denotes the "fundamental reason" for our existence. It is broad enough to last for 100 years but still narrows the focus from serving all businesses. Here are some additional examples:

Examples:

DC Mosquito Squat - "Connecting people in their outdoor spaces."

Caboodle - "To empower people to anticipate and manage their money matters."

Iron Tribe Fitness - "To create fitness communities that change lives."

Take a few minutes to ponder on the following questions and take a crack at writing your first draft of your companies purpose on page 5.

Questions:

1. Why did you start your company in the first place?
2. What legacy are you hoping to leave behind as a result of your business?
3. What part of your job most excites?

Notes:



Mission

Mission

Once you have a purpose clearly stated you are ready to begin to consider your 3-5 year mission. Here is Jim Collin's description of what a mission is:

Mission is a clear and compelling overall goal that serves as a focal point of effort.

Unlike purpose, which is never achieved, a mission should be achievable. It translates values and purpose into an energizing, highly focused goal. It is crisp, clear, bold, exhilarating. It reaches out and grabs people in the gut. It requires little or no explanation; people "get it" right away. Once a mission is fulfilled, you return to purpose to set a new mission.

We have found that a company's mission is most powerful when it clearly aligns to the company's purpose and is measurable. With the mission we are no longer focused on something theoretical. It should be obvious to everyone when you accomplish your mission.

At Infusionsoft our mission is to "create and dominate the market of all-in-one sales and marketing software for small business with 100,000 customers worldwide." Here are some other examples:

Examples:

DC Mosquito Squat - "Perfect our system of delivery to dominate the DC outdoor pest control market."

Caboodle - "To build the first 'tribe of Australians actively improving their financial well being and reaching, by the end of 2017, 5000 members'"

Iron Tribe Fitness - "To change the lives of 100,000 athletes through 500 thriving fitness communities by the end of 2020."

Consider the following questions and write draft 1 of your 3-5 year mission. Record it on page 5:

Questions:

1. What is the most important work for your company to be doing over the next few years?
2. What is the next major mile marker on the path to accomplishing your purpose?
3. If the next 3-5 years went perfectly, what would be some key indicators?

Notes:



Values

If the purpose is the “why” and the mission is the “what”, the values are definitely the how. They are vital to being able to preserve the “it” factor that makes your company special.

Core values and beliefs are like an ether that permeates an organization —its decisions, its policies, its actions — throughout all phases of its evolution. Some companies refer to this as their guiding philosophy.

Core values and beliefs form a system of fundamental motivating principles and tenets — precepts about what is important in both business and life, how business should be conducted, its view of humanity, its role in society, the way the world works, what is to be held inviolate, and so on.

This “ether” as Jim Collin’s describes it is one of the distinguishing factors that separates good companies from great ones. At Infusionsoft we consider ourselves to be a values driven company, which means that every day you can hear employees at all levels speaking into them. Most companies list 5-10 core values that describe the way they do business.

Examples:

DC Mosquito Squat - “We take the initiative”, “We are data driven”

Caboodle - “We are fun to be around”, “We work hard and keep it simple”

Iron Tribe Fitness - “We live the code”, “We connect to God’s Blessings and with his purposes”

Values are descriptive not aspirational. Consider these questions and write down some of your values. You can see that “We...” statements can be helpful.

Questions:

1. To you, what are the elements that have led to success in the way you have done business?
2. How can you tell when it’s not being done in your company’s way?
3. If someone were to describe what makes you as a founder special what attributes would they feature?



Purpose



Values



Mission

Use this page to outline your first draft of your companies purpose, values and mission. Remeber this is just the first draft, no need to make it perfect yet!



Purpose



Values



Mission

PURPOSE

To help small businesses succeed

VALUES

We empower entrepreneurs
We listen, we care, we serve
We do what we say we'll do
We practice open, real communication
We face challenges with optimism
We check our egos at the door
We innovate and constantly improve
We do the right thing
We believe in people and their dreams

The Everest Mission

To create and dominate the market
of all-in-one sales & marketing software
for small businesses.

OUR PROVEN PATH

1. Small business champions (< 100 employees)
2. Usage is king – Get Started
3. Skin in the game
4. Partner success multiplies customer success
5. Fast, friendly, free support
6. Personalized automatic follow-up
7. Quarterly planning aligns and empowers
8. Culture is strategy
9. Invest in leadership development
10. Keep the human connection

3 YEAR PRIORITIES

1. 100% Customer Success
2. Design the Great SB CX
3. SBS Platform
4. Leadership Factory
5. Systems Excellence

SUMMIT 2016

★ Customers 100,000
Revenue \$200M
Employees 1,000

Camp 3 2014

✓ Customers 25,000
Revenue \$100M
Employees 600

Series D Financing

Camp 2 2012

✓ Customers 12,000
Revenue \$50M
Employees 340

Series C Financing

Camp 1 2010

Customers 6,000
Revenue \$20M
Employees 135 ✓

Cash Flow Positive

Base Camp 2007

Customers 1,000
Revenue \$5M
Employees 78 ✓

Raised VC



VITAL SIGNS 2016 Target

- LTV : CAC 5:1
- NPS 60
- Profit / Growth # 40
- 100% Revenue Retention

TARGET MARKET

True Small Businesses

- Under 25 employees
- Over \$100,000 in sales

POSITIONING

Infusionsoft is the all-in-one sales and
marketing software for small businesses

BRAND PROMISE

The easiest way to get
organized, grow sales
and save time

THE IRON TRIBE BRAND VISION

Purpose (The Guiding Star)

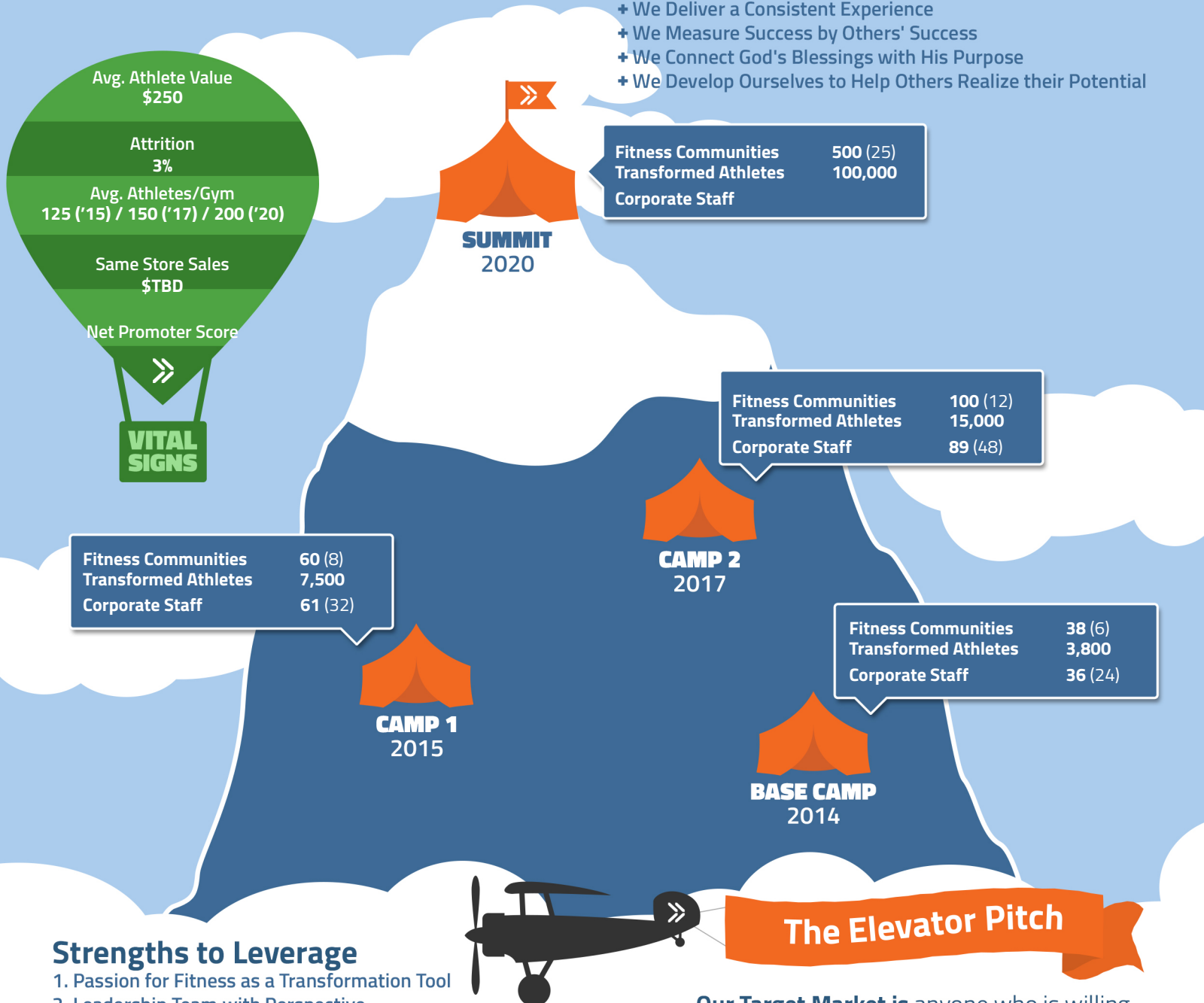
To Create Fitness Communities that Change Lives.

Mission (The Summit of The Next Mountain)

To Change the Lives of 100,000 Athletes Through 500 Thriving Fitness Communities by the End of 2020.

Core Values & Beliefs (The Character)

- + We Live the Code
- + We Collaborate to Innovate
- + We Work Hard with Excellence
- + We Build Lasting Relationships
- + We Practice Honesty and Integrity
- + We Deliver a Consistent Experience
- + We Measure Success by Others' Success
- + We Connect God's Blessings with His Purpose
- + We Develop Ourselves to Help Others Realize their Potential



Strengths to Leverage

1. Passion for Fitness as a Transformation Tool
2. Leadership Team with Perspective
3. Career Opportunity in Fitness
4. Community Driven Culture
5. Commitment to Franchise Partner Success

Strengths to Develop

1. Proprietary Technology Platform
2. Product Delivery Training and Support
3. On-Site Leadership Presence
4. Onboarding People: Athletes / Staff / Franchise Partners
5. In-Market Brand Awareness - The Ramp Up

Our Target Market is anyone who is willing to make a sacrifice to change their life.

Our Positioning is Iron Tribe is the leader in results based group fitness.

Our Brand Promise is to put the personal experience and fun back into group fitness.

MISSION: BELTWAY

PURPOSE

Connecting people in their outdoor spaces.

MISSION

Perfect our system of delivery to dominate the DC outdoor pest control market.

CORE VALUES

- We take the initiative
- We innovate and constantly improve
- We believe in meeting all our customers needs
- We value open & honest communication
- We are consistent, accountable & transparent
- We have **"I can"** attitudes
- We believe investing in our business is investing in our people
- We believe work should be fun
- We are data driven

GOALS

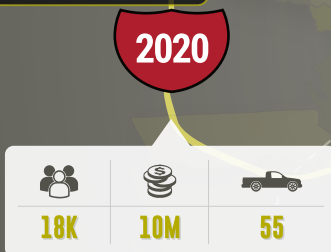
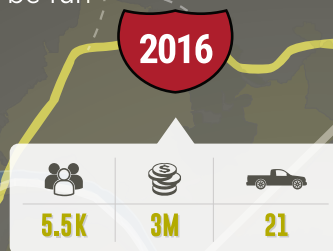
VITAL SIGNS

80% RENEWAL




80% RETENTION RATE

80% NPS SCORE

2HR 1ST RESPONSE TIME



LEGEND

-  No. of Customers
-  Revenue
-  Trucks

STRENGTHS TO LEVERAGE

- Largest outdoor pest control company
- Best management for seasonal business
- Large market in area
- Strong tech infrastructure
- Tools and equipment - given the best
- Training materials
- Optimism - positive attitudes
- Potential experience
- Well-branded
- Charities - Malaria No More
- Marketing
- Follow-up with customers
- Zendesk - sorting and solving things
- Products - strength in type of products used

STRENGTHS TO DEVELOP

- Cross training - we need more of it
- Surrounding locations
- Zendesk - people still using it incorrectly
- Seasonality of business - employees
- Multiple SAAS Apps
- Scheduling
- Budgeting
- Hours - how to manage workload - middle management - distribute work
- Employees who don't care
- Lack of security for inside and outside
- Response time to customers
- Remote employee (*Olivia being in CA*)
- 80/20 rule - 80% of work is being done by 20% of people



caboodle THE 2017 ADVENTURE

To build the first 'tribe' of Australians,
actively improving their financial well being,
and reaching, by end 2017,
5,000 MEMBERS

**NUMBERS
CONNECTED
TRIBE**

2014



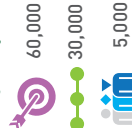
2015



2016



2017



PURPOSE:

To empower people to
anticipate & manage
their money matters

VITAL SIGNS FOR 2017

- ✓ Numbers : Connected 2:1
- ✓ Connected : Tribe m'ship 6:1
- ✓ Lost souls ▼ 30%
- ✓ Attrition ▼ 3%
- ✓ Team Responsiveness ▲ 90%

STRENGTHS TO LEVERAGE

1. Interpreting & applying new innovations
2. Intelligence gathering CRM
3. Translating complexity for customers
4. Broad B2B network
5. Low dependence on new business

VALUES

- ✓ we take the time to listen to people's stories
- ✓ we're fun to be around
- ✓ we communicate with empathy
- ✓ we aim to empower, not direct
- ✓ we face challenges with optimism
- ✓ we work hard to keep it simple
- ✓ we enjoy the adventure of innovation
- ✓ we do what we say we're going to do

STRENGTHS TO DEVELOP

1. Embedded & tangible culture
2. Established client pathway
3. Lead generation & closing skills
4. Strategic planning & reporting structure
5. Systematised B2B engagement



To learn more about how you can take your company from
1M to 10M and beyond visit: [**elite.infusionsoft.com**](http://elite.infusionsoft.com)