



Rockefeller Habits Checklist

Name:

Company:

Date:

Place a checkmark next to those listings that are in place in your business. Then rank each of the ten habits [in blank provided] on a scale of 0 to 10 as to how well these disciplines are established in your business. Zero represents not at all in place and ten represents in place and performing at high level.

- ___ 1. Everyone aligned with #1 thing that needs to be accomplished this quarter to move company forward
 - ☐ 5 priorities (Rocks) are identified and ranked for the quarter
 - ☐ A Critical Number is identified and aligns with the #1 priority
 - ☐ A Quarterly Theme is established that brings the key priority/Critical Number alive
 - ☐ A scoreboard for the Critical Number is posted and Theme announced
 - ☐ All employees know what the Celebration/Reward will be
- ___ 2. Communication rhythm is established. Information moves through organization accurately and quickly
 - ☐ All employees are in some kind of a daily and weekly huddle
 - ☐ Huddles cascade from senior management to frontline or vice versa
- ___ 3. Every facet of the organization has a person assigned with accountability for ensuring goals are met
 - ☐ Income (P&L), Cash Flow, & Balance Sheet statements have persons assigned to each line item
 - ☐ An accountability chart has been created
- ___ 4. Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities
 - ☐ Employee hassles/ideas/suggestions/issues are being collected weekly
 - ☐ There is a systematic process for addressing issues and opportunities
 - ☐ Thank You cards are being written every week by senior management
- ___ 5. Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data
 - ☐ All employees are involved in collecting customer data
 - ☐ There is person assigned accountability for customer feedback
 - ☐ All senior leaders communicate with at least one customer weekly
- ___ 6. Core ideologies are "alive" in the organization
 - ☐ Core ideologies are discovered and defined
 - ☐ Stories are being shared of employees who represent the ideologies
 - ☐ Core ideologies are included in appraisal and recognition processes
- ___ 7. Clear understanding of the firm's market position drives strategic planning and sales and marketing
 - ☐ Brand Promise and market (Sandbox) are clearly defined
 - ☐ The organization is aligned around 5 key strategies (Thrusts/Capabilities) for growth
- ___ 8. All employees can report at any time what their productivity is and how it compares against goals
 - ☐ Smart Numbers (key performance indicators) are identified for the organization
 - ☐ Weekly measures for each individual/team are clearly displayed and reviewed
- ___ 9. A "situation room" is established for the weekly executive team meeting
 - ☐ Smart Numbers and Critical Numbers are posted bigger than life with goals clearly shown
 - ☐ Data is presented graphically to help visualize trends
 - ☐ Core ideologies, priorities, and market maps posted
- ___ 10. As goes the Executive Team goes the rest of the firm
 - ☐ Team members understand each other's differences, priorities, and styles shown
 - ☐ The team meets offsite every few months for strategic thinking and renewal
 - ☐ The team is having fun together