

## HOW TO USE THE MONTHLY SECTIONS

**At the start of each month, fill in the Main Goals/Tasks/"Big Rocks" page.**

Use this page to get your "Big Rocks" into your month's schedule. You may choose to re-state some of the tasks from your Goals Worksheets, and you may also choose to insert other important items – even ones that don't appear on your business plan. "Big Rocks" don't *only* come from your business plan. For instance, you may have a major prospective account coming for a plant inspection. Preparing for such an event certainly qualifies as a "Big Rock."

Keep it under control, though, and don't let this page turn into a simple "to-do list." Remember the purpose of the page: to keep this month's "Big Rocks" on your radar screen.

*To truly turn your goals and plans into actions, get this info onto someone's calendar or to-do list!*

**At the end of each month, fill in the two pages of financial and operational results.**

### Performance Measures – an Overview

The first thing you'll notice is that there is plenty of data to be entered, and it's all going to be hand-written. It looks like a lot of work. It is, but read on ...

We intentionally made this a manual entry chart. We could have simply made up a page that said, "Print out your financial statements and insert them here." But we didn't. Here's why we want you to manually enter all this data: *This is as much a learning exercise as it is a results-measuring exercise.*

Most small business owners, by their own admission, don't have a good handle on their company's finances. One of the best ways to become intimately familiar with the numbers is to work with them. And that's just what you'll do in this section – find the required numbers in your financial statements, fill them into the blanks in this book, and calculate variances from targets. This will be a terrific learning experience if you stick with it and don't cut corners. Take the small amount of time it requires, knowing that you're gaining proficiency each time you do it.

These are divided into 4 areas:

- **Financial Excellence**
- **Customer Satisfaction**
- **Workplace Excellence**
- **Employee Satisfaction & Proficiency**

This is a variation on the "Balanced Scorecard" theme. (If you want to know more about Balanced Scorecards, the Internet has plenty of information for you.) Basically, it is an approach to measuring your company's performance by looking not just at financial measures, but also at various operational measures.

Many measures are provided, but flexibility has also been built into the charts which allows you to pick your own performance measures.