CHAPTER 1 WORKSHEET

Infrastructure

YOUR COUNTERSTEER	Sections of the plan actually written down, and the date you last opened it — not just this year's revenue number.
YOU WALK AWAY WITH	A written business plan you built section by section, and a review cadence that keeps it from becoming decoration.

YOUR NAME | COMPANY | DATE STARTED

Fill this in on screen or print it. Type in any box and save the file to keep your answers. Don't polish it. Fill in what you know, leave the rest blank, and come back to it.

THE CHAPTER IN ONE MINUTE	
COUNTERSTEER	Plan sections written down, and the date you last opened the plan.
MEASURE IT WITH	Plan sections complete; monthly reviews held.
THE TRAP	Letting the plan become decoration: written once, never reopened.
THIS WEEK	Draft your one-page plan in 45 minutes and book the first review.

Your Assignment

Step 3 of the method: Grab the Wheel. Tick each one off as you finish it.

- ☐ Draft your One-Page Business Plan in under 45 minutes. Don't polish it — just answer every line. DONE ON
- ☐ Answer the six strategic questions (who, what, where, when, why, how) for your own business, in your own words. DONE ON
- ☐ Name one number you check obsessively, and write down the activity driver sitting underneath it. DONE ON
- ☐ Put your first plan review on the calendar right now — one month from today. DONE ON

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The Six Strategic Questions

Who, what, where, when, why and how. Answer for your business, in your own words.

Who is your customer?	
What need are you fulfilling?	
Where do they buy, and are there geographic limits?	
When are they in the market to buy?	
Why do they choose you over a competitor?	
How much are they willing to spend?	

One-Page Business Plan

The rest of the plan. Forty-five minutes, every line answered.

Executive summary (2–3 sentences)	
Products/services offered	
Target market & segment	
Value proposition (one sentence)	
Pricing strategy	
Ownership & legal structure	
Key roles needed (org chart in miniature)	

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Break-even estimate	
Year 1 revenue goal	
Top 3 risks	

Review cadence: monthly for year one, then quarterly. If you're not touching this document at least four times a year, it's decoration, not a control plan.

Plan Review Log

Book the first review one month from today. Log each one. A missed review is rescheduled within the week.

Review	Date held	Sections updated or decisions made	Held
Review 1			☐
Review 2			☐
Review 3			☐
Review 4			☐
Review 5			☐
Review 6			☐
Review 7			☐
Review 8			☐
Review 9			☐
Review 10			☐
Review 11			☐
Review 12			☐

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KPI Dashboard: Financial, Operational and Activity Measures

Chapter 1, applied. The examples are from the book's Appendix. Pick three functions and write your own.

Function	Financial	Operational	Activity driver
Sales	Revenue, gross margin per sale	Close rate	Quotes sent, prospecting calls made
Marketing	Cost per acquisition, pipeline value	Conversion rate	Content published, campaigns launched
Purchasing	Cost of goods, vendor spend variance	Vendor scorecard average	POs issued on time, 3-way matches completed
Operations	Cost per unit	On-time delivery rate	Standard work followed, in-process checks performed
Human Capital	Cost-per-hire, total labor cost	Turnover rate	Stay interviews held, 1:1s completed
Payroll	Compliance penalties paid	Payroll error rate	Timesheets approved on time, audits performed
Accounting	Bad debt, cash balance	Days sales outstanding	Invoices reviewed before sending, collection calls made
Safety	Workers' comp cost	Incident rate	Near-misses reported, audits completed
Quality	Rework cost, scrap cost	Defect rate	Process audits completed, improvement ideas submitted

Your three

Function	Financial	Operational	Activity driver

The test from Chapter One: if an employee can't walk in tomorrow and directly move the number through something they do differently that day, it belongs in the Financial column, not the Activity driver column.

The Number You Check Most

The one number I check obsessively	
The activity driver sitting underneath it	

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Find the Driver and Map Your Route

Step 1 and Step 2 of the method. Start with the result you want to move, then work down to the activity someone can change tomorrow morning. Write a person's name, not a department.

Result I want to improve *The number on the statement or report.*	
Financial driver affecting it *What is pushing that result up or down.*	
Activity driver my team can change *Something a person does, or doesn't do, every week.*	
Accountable Owner *One person, by name.*	
Measure and target *One number you can read in under a minute.*	
Tuesday review: day and time	

Tuesday Test: could someone move this number by doing something differently tomorrow morning? ☐ Yes, it passes ☐ No, pick a different driver

Copy this row to your Countersteer Dashboard (Appendix): Infrastructure — activity driver, owner, measure and target. Review it for 15 minutes every Tuesday.

Your Commitment

This week *Draft your one-page plan in 45 minutes and book the first review.*	
Done by (date)	
Who will I tell I've done it?	

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