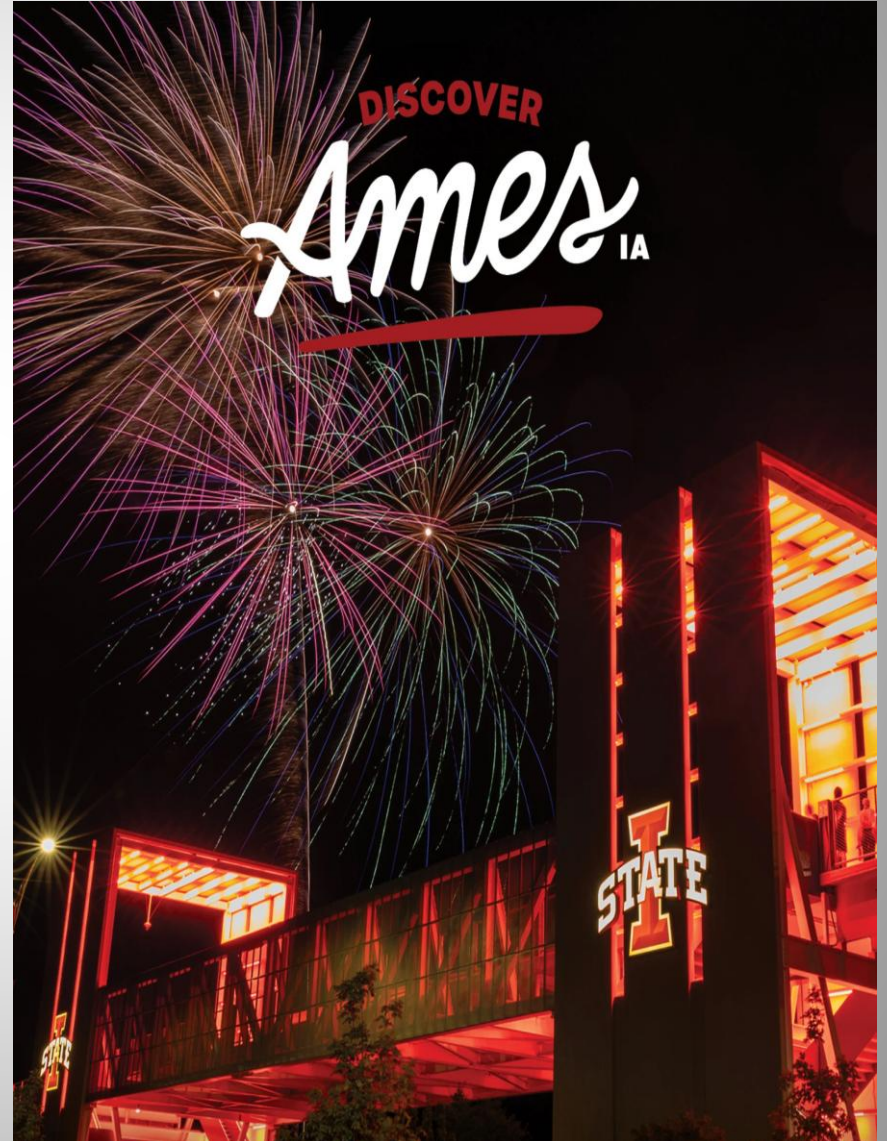


BEYOND BUSY

**Building an Organization
That Can Grow Without
Depending on You**

Strategic Growth Planning

**Fred Kreger
Global State Mortgage**



Are you leading or holding it together?

**If you stepped away
for 30 days,
what would break first?**



Notice the dependency

Where does the organization rely on your presence?

Build the capability

What would the team need to keep moving?

Why do capable organizations still get stuck?

- The leader becomes the approval system.
- Urgent work crowds out strategic work.
- Important numbers are reviewed too late.
- Plans disappear into daily operations.



Define the growth you want

Financial strength

More profit or operating surplus, not simply more revenue.

Community impact

A better visitor experience, wider reach, or stronger mission results.

Capacity and freedom

A capable team and less dependence on one person.

In 12 months, what should be measurably better?



A plan on the shelf cannot guide today's decisions

Preparing for what you do not see coming.

Every organization has a blind side. What capability should you develop before circumstances force you to change?



Practice before the game changes.



Environmental Scan

Trends

WHAT IS CHANGING

Industry Opportunities

***HOW COULD IT
AFFECT US***

**Strengths/Core
Competencies**

**WHAT SHOULD WE TEST
DURING THE NEXT 90
DAYS?**

AI expands capacity. Leadership sets the direction

The Intelligent

Use AI to spot patterns, test ideas, and reduce routine work.

The Human

Culture and trust grow through what leaders say and do.

The Leadership Choice

Courage and accountability remain with people.



Where can AI give your people more time for human work?

Know the numbers that drive decisions

Revenue + profit or operating surplus

Which programs create value after their costs?

Cash flow + seasonal reserves

Can cash cover commitments through the slower months?

Retention + staffing capacity

Do customers return and can the team deliver consistently?

Choose 3–5 measures. Give each an owner and a review date.

Know your Numbers that Drive Decisions

Example

	2025 Results	90-Day Target
Monthly Visitors		
Revenue per Visitor		
Repeat Visitor rate		
Group Bookings		
Reviews above four stars		
Top visitor referral sources		

**Purpose guides decisions when the
leader is not in the room**

Downtown:
The *heart*
of Ames

Our organization helps people _____

Translate strategy into execution

GOAL | The result

What measurable outcome are we pursuing?

STRATEGY | The approach

How will we address the constraint?

ACTION ITEMS | The work

Who will do what, by when, and how will we know?



Strategy Math

X → Y → BY WHEN

Illustrative strategy

Reduce routine approvals requiring the director from 10 to 3 per week within 90 days.

Add an owner, a data source, and a quality measure.

Rockefeller Habits



SCALING UP WITH A CLEAR
STRATEGY. PICK A LANE +
MARKET POSITION, AND SAY
“NO” TO THE REST



ALIGNING TEAMS FOR
MAXIMUM EFFICIENCY AND
EXECUTION. RUN A WEEKLY
RHYTHM EXERCISE.
PRIORITIES +SCORECARD +
ACCOUNTABILITY.



IMPLEMENTING THE RIGHT
METRICS FOR MAXIMUM
RESULTS. TRACK THE RIGHT
NUMBERS SO YOU CAN
COURSE-CORRECT FAST AND
SCALE CLEAN

Example of a 90-Day Plan for Increasing Weekday Attendance

GOAL #1 (What do you want to achieve?)

Increase weekday attendance by 15% within 90 days.

STRATEGIES (How will you get there?)

By increasing partnerships with local employers and community organizations from 10 to 15.

ACTION ITEMS (Step-by-step tasks)

Develop a group package, contact 20 organizations, and launch two weekday promotions.

ACCOUNTABILITY PARTNER (Who will check in with you?)

Marketing Director

CHECK-IN DATE (When will you review progress?)

Review: Every other Friday.

Live Breakout: Build Your 90-Day Plan

Let's fill this out together. This is your roadmap for the next 90 days

GOAL #1 (What do you want to achieve?)

STRATEGIES (How will you get there?)

ACTION ITEMS (Step-by-step tasks)

ACCOUNTABILITY PARTNER (Who will check in with you?)

CHECK-IN DATE (When will you review progress?)

THE POWER OF THREE

THE RULE OF

3

Most organizations execute better when they limit each quarter to three major priorities.

01



3 PRIORITIES

Pick exactly 3 outcomes that matter most this quarter. Go deep, not wide.

Focus. Execute. Repeat.

02



3 MEASURES

Set 3 measurable goals for the next 90 days: attendance, revenue, guest experience, staffing capacity, or another measure tied to your goal.

Clear. Measurable. Achievable.

03



3 RELATIONSHIPS

Identify three partners who could expand your reach, improve the visitor experience, or strengthen execution.

Nurture. Connect. Grow.

"Where focus goes, energy flows. Limit your focus to three and watch what becomes possible."

Accountability Partner

Choose a partner who will ask the hard questions

Share your commitment

State the goal, the leadership change, and the first action.

Ask for a specific challenge

"What did you commit to, and what actually happened?"

Book the review now

Set a date, bring the measures, and agree on the next step.



Who will hold you accountable without doing the work for you?



Celebrate your Successes!

Your next level starts with how you lead

**What must change in how I lead
for this organization to reach
its next level?**

Within seven days, I will...



Name the action. Name the owner. Set the date.

Are you leading or holding it together?

**If you stepped away
for 30 days,
what would break first?**



Notice the dependency

Where does the organization rely on your presence?

Build the capability

What would the team need to keep moving?

THANK YOU

Your next move sets the direction

What will you put into action first?

**Download your
workbook**