From Trading to Scaling

Six things that turn a company
that trades into a company
that scales

DESIGNED TO ACCOMPANY THE BOOK

- The Strategy Template
- The OKR Template
- The Idea Collection sheet
- The Bonus Calculator
- The AI install pack

ZOKRI

CONTENTS

The templates referred to throughout are real documents. They come in the pack this book arrived with.

Before you start

This is short on purpose. About an hour.

Most business books are one idea stretched over sixty thousand words, and most people do not finish them. I would rather you finished this one, because there is a system in it, and a system is no use in pieces.

Three things you should know.

It is six things. Not a framework with tiers. Six, and you will have met all of them by chapter ten.

The templates are real. Everything I describe exists as a document you can copy. You can download them.

And you can do all of this without us. Some companies should. I will say so again at the end, and I will mean it then too.

START HERE

The six things, on one page

The Focus

01

Two or three choices you are genuinely resourcing, with the hardest thing under each named, on one page.

The Numbers

02

The few measurements that matter. The metrics that focus attention would change a decision, with the logic and evidence written next to each.

The Ideas

03

A written brief, open submission, grouping and voting, so good ideas are not forced to become goals too early.

The Goals

04

Outcomes rather than activity, tagged to a choice, with named people, time percentages, dates and what came off their plate.

The Work

05

One meeting a week that ends in a decision: continue, change or stop. Confidence rather than progress. An honest ending for every goal.

The Brain

06

The record of what you tried, decided, and learned, captured as a byproduct and installed where your AI can read it.

PART ONE

What happened to you

01 Nobody designed this

That matters more than it sounds, and it is why I am writing a book rather than a diagnosis.

Companies usually do not get the chance to design how they run. There is always something more urgent than a conversation about a framework, a process, or a new way of organising yourself, so these conversations are the ones that always lose, because nothing breaks the week you skip them.

So the way of working becomes whatever survived. Not the best version. The version nobody got round to changing.

And a system nobody chose is a system nobody feels responsible for. Which is why asking a leadership team what is wrong with how they run produces such careful answers. They are not defending it. They have never thought of it as theirs.

The part that changed how I work

For a long time, I treated the problems I was brought in to solve as people problems. They arrive described that way. My team are not ambitious enough. Nobody tells me bad news early. Nobody finishes anything.

Those are all behaviours. And a behaviour is not a character trait. It is what somebody does because of what they feel, and what they feel comes from what they have watched happen.

Take the first one, because I hear it more than any other.

To set an easily achievable goal on purpose, what would somebody have to be feeling? Probably that reaching and missing costs them something, and that comfortably hitting a modest number is the safer trade.

And where would they learn that? From a previous job, perhaps. Or, in a review, the team that missed an ambitious goal had a harder time than the team that hit a small one. Or, from the stretch target that arrived with no extra resources.

Here is what surprises leaders most, and it surprised me. Often, what people believe is not even true. Nobody was punished for missing. But one person thought they were, told two people, and it became a fact everybody acts on, and nobody says out loud.

Which means encouragement will not fix it. There is no talking somebody out of what they watched.

Why is this good news?

A people problem is heavy. It implies hiring, or personalities, or a culture that needs years of work.

A design problem is different. **You can change a design on any day of any week.**

If the reason a team is cautious is that they watched caution get rewarded, then what happens next time is the intervention. Not a workshop. What actually happens to the next team that misses something ambitious, and whether anybody notices it out loud.

That is a smaller job than fixing people. It is also the job nobody is doing because it does not look like work. It looks like paying attention.

What is this book?

Six things.

Two or three choices the company is genuinely resourcing. The measures that would change a decision. Goals as outcomes, with real people's time attached. One weekly rhythm that ends in a decision. Recognition that gets designed rather than improvised. And a memory, so the next person inherits what this one learned.

Most of it will feel obvious as you read it, which is good. **The difficulty is never understanding these six things. It is that installing them means changing meetings that already exist and habits that already work well enough.**

That is what the last part of the book is about.

I should also say, early, what I think will actually happen if you do this. Not faster reporting or tidier planning, although both come.

I think you will find out that your team was better than your system let them be. That has been the most common outcome I have seen, and it is consistently the one nobody expects.

02 Somebody designed the hospital

In a well-designed hospital, it is about ninety seconds from the ambulance bay to the resuscitation room.

That is not luck. Somebody sat with a drawing and decided it. They knew what happens in those ninety seconds, they knew the trolley needs to turn a corner without stopping, and they put the doors where they went for that reason.

FIGURE 1 · EVERY DISTANCE WAS SET BY SOMEBODY, OR BY NOBODY

DESIGNED

Ambulance bay —— 90 seconds —— **Resuscitation**

ACCIDENTAL

A problem appears - - - ? - - - **Somebody can act**

The corridors in your company are made of meetings, routes and permissions rather than walls. They still have a length, and somebody set it.

Nobody who works in that building thinks about it. The porters do not know they are inside somebody's decision. **They just find that the right thing is the easy thing to do, all day, without effort.**

That is what a design does. It is not a set of rules. **It is an environment that makes good work the path of least resistance.**

Nobody designed yours

Your company also has corridors. They are just not made of walls.

They are the meetings where a decision gets made, or does not. The moment somebody finds out a project is in trouble, or it's hidden until too late. The half hour where a good idea either gets heard or gets forgotten. The route a piece of bad news takes to reach you, and how much it changes on the way.

> **Every one of those is a distance, and every distance was set by accident.**

Which means your people are walking a route nobody chose, and when they take longer than you would like, or arrive with the wrong thing, they are doing exactly what your designs tell them.

This is the job, and it is probably not in your diary

> **You are the architect of how your company works. Not because you applied for that job. Because nobody else in the building can do it.**

A functional head can improve its own function. A good manager can protect their own team. **Only you can decide what the environment teaches everybody**, because only you own more than one part of it. That is not a claim about your talent; it is a fact about your position.

And I would put it higher than most of what is currently in your calendar. Strategy decides what to aim at. Hiring decides who aims. **The design decides what all of them actually to do when nobody is watching**, and it does that every day, for everyone.

So why does nobody do it?

Three reasons, and none of them are about intelligence.

It does not look like work. There is no deliverable.

There is no job title for it. Nobody owns how the company decides, so it belongs to whoever last had an opinion about it, although the COO or Chief of Staff tends to have it in their Job Description.

And nothing breaks the week you skip it. The one that does the real damage. A design problem never presents as urgent. It presents as everybody being slightly slower than they should be, for years.

Which is also why it is available. Almost nobody is doing this, including your competitors, so the return on it is unusually high for something that costs so little.

What it looks like when the load is accidental

Two examples, and I choose them because most companies have both.

The monthly meeting where each part of the business gives an update. Too long, half of it slides that could have been an email, and nobody can name a decision that came out of the last one.

Look at what it is carrying. It is the only hour of the month when someone has to stand before their peers and explain why a project they started nine months ago is still ongoing. **Nobody designed it for that.** It is doing the most important job in the room by accident, which is why shortening it feels sensible and costs so much.

And the away day. Two days, expensive, half of it theatre, and the last one produced a list nobody looked at again.

What is it carrying? The only time in the year the leadership team is out of the business, together, with nothing scheduled and permission to ask whether the plan still makes sense. **The permission was the point, and it was never designed either.** It came free with the venue.

An architect would not accept either of those. Not because removing them is dangerous, but because **valuable functions in that company are currently being performed as side effects.** Somebody should decide where they live, deliberately, and then they will keep happening.

What an architect actually does

Not an audit. Two habits, and they are quick.

Decide what each thing in the week is for, and say it out loud. Not what it is called. What it produces, and what it teaches. A meeting with a stated purpose survives a busy month. One with an inherited purpose does not.

And when you move something, name what picks up the load. Every time. This is the whole of good practice, and it takes one sentence.

That second habit is why Part Two is shaped the way it is.

> **Each of the six parts either enhances or replaces something you already have, and each names what it is picking up.**

The weekly rhythm replaces your status meeting and picks up the accountability, twelve times as often, with a name against each decision. The one page replaces the annual plan and picks up the argument. The monthly look at the measures picks up the away day's best hour and asks its question without needing a venue.

> **If I told you to cancel your status meeting and nothing picked up what it was quietly carrying, I would have made you faster at running the wrong things and called it progress.**

And the reason to enjoy this

Everything above sounds like maintenance. It is not. It is the most interesting problem in the building.

You get to decide how far it is from a problem appearing to somebody being able to act on it.

You get to decide whether the honest answer or the comfortable one is easier to say.

You get to design a company where doing good work is the path of least resistance, which is a real thing you can build and which most people never get to work in.

03 Focus is division

Focus is arithmetic, and almost nobody does the sum.

The numbers

Take a hundred-person company, because the arithmetic is easier to follow at that size. It has roughly 184,000 working hours in a year. Take holidays, sickness, and the honest amount of time that goes into email and meetings and the ordinary friction of a working week.

Most of that runs the business, and it should. Serving customers, closing books, shipping what is already promised, hiring, answering the phone. Call it seventy per cent, which is generous in its ambition.

> **That leaves about thirty person-years to change the company with.**

Thirty person-years is a lot. It is also all of it. There is no second pool.

Now divide

I have sat in planning sessions where each member of a leadership team named their most important thing, in good faith, and the list came to eleven.

Divide thirty person-years by eleven priorities.

Two and three-quarter person-years each. Which is roughly one and a half people, part-time, on something the annual plan calls critical.

Nobody decided that. Nobody would have signed it off if it had been written that way. **It is simply what eleven priorities mean once you divide, and the division never happens because nobody's job is to do it.**

Why the sum works when the argument does not

Arguing about focus in the abstract is unwinnable, because everybody's priority is genuinely important. That is why the list gets to eleven: eleven people were right.

The division is different. It is not a judgement; it is a consequence. **Nobody has to lose an argument for the arithmetic to change somebody's mind.**

And it works in the other direction too. If you have three choices and thirty person-years, that is ten person-years each. Ten person-years is a real team, for a real stretch, with room to be wrong once. That is what a resourced choice looks like, and most leadership teams have never seen the number written down.

What it looks like on paper

Now ours. Four lines, and it fits on a napkin.

FIGURE 2 · FOCUS IS ARITHMETIC, AND THE DIVISION NEVER HAPPENS

People	200
Available hours	roughly 368,000
Share on running BAU	70 per cent
Hours to change the company with	110,000 · about 60 person-years
Current priorities	9

Which is 6.6 person-years each.

NINE BETS

6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6	6.6

OR THREE

20 person-years	20 person-years	20 person-years

Twenty person-years is a real team, for a real stretch, with room to be wrong once.

Then one question: **would you fund that as an outsider?**

Would you back nine separate bets with six person-years each, or three with twenty?

04 Why your people do what they do

This is the chapter the rest of the book depends on.

What **people do** comes from **what they feel.** What they feel comes from **what they know** and have watched happen**.**

Read it backwards to work out what is wrong. Read it forwards to design something better. That is the whole model, and it has two arrows.

FIGURE 3 · READ IT FORWARDS TO DESIGN, BACKWARDS TO DIAGNOSE

THEY HAVE SEEN
What they know
→
SO THEY
Feel
→
SO THEY
Do

FORWARDS → DESIGN THE BEHAVIOUR YOU WANT   ← BACKWARDS, DIAGNOSE THE ONE YOU HAVE

Diagnose. Start with the behaviour. What would somebody have to feel to do that? Where would they have learned it?

Design. Start with the behaviour you want. What would they have to feel? So what do they need to watch happen?

Start with a complaint

Every complaint a leader has about their people is a behaviour. Here are some you have probably said or heard.

My team are not ambitious enough. Nobody tells me bad news early. Nobody takes ownership. Nothing ever gets finished. They wait to be told. Nobody flags a risk until it is a problem.

Each one arrives as a statement about people. Each one is a behaviour, and behind a behaviour there is a feeling, and behind the feeling there is something somebody watched.

Take the second one, because it costs the most

Nobody tells me bad news early.

What would you have to feel to sit on a problem for three weeks? Probably bringing it up early is the problem. The person who raises it becomes its owner. That there is a chance it resolves itself, and then you never have to be the one.

Where would you learn that? From the meeting where somebody flagged a risk and spent the next forty minutes defending themselves. From the project that went badly and the review that was mostly about who knew what and when. From watching a colleague raise something honest and get a reputation for negativity that outlasted the project.

So the fix is not asking people to be more open. You can ask, and they will agree, and nothing will change, because you have not altered the thing they are responding to.

The fix is what happens to the next person who brings bad news early. In front of others. Whether they get thanked or handled.

The part that catches everybody

We have spoken to a huge array of people about how their businesses operate. **Often, what people believe is not true.**

Nobody was punished for missing an ambitious goal. But one person thought they were. They told two people. Those two adjusted their behaviour and told others why. Within a year, it becomes a fact everyone acts on, nobody says out loud, and no leader has ever had the chance to correct it because it was never said to them.

That is why this cannot be fixed by communication. There is nothing to correct, because nothing was ever claimed. And it is why the design matters more than the message: **the only way to overwrite what people watched is to let them watch something else.**

Reading it forwards

Now use it deliberately. Pick the behaviour you want.

We want people to stop things that are not working early and without drama.

What would they have to feel? That stopping is a good outcome. That the reasoning matters more than the result. That nobody's standing drops.

So what do they need to watch? A goal was stopped by a senior person, who said out loud, with the reasoning kept, and the person thanked. Once. Maybe twice. Then it is true here.

That is a design, and it takes about ten minutes of somebody's courage rather than a change programme.

Where this shows up in the rest of the book

Every one of the six things is specified twice: what it produces and what it teaches.

The weekly meeting produces a decision. What it teaches is whether honesty is safe here, and that is decided by the first question the person chairing it asks.

The goal template produces a resourced goal. What it teaches is whether ambition is supported or decorative, and that is decided by whether anything came off somebody's plate to make room.

The recognition list produces a moment of praise. What it teaches is what this company actually rewards, and it overrides everything above it.

A ritual you designed for what it produces will teach whatever it happens to teach. That is how well-run companies end up with behaviour nobody wanted and nobody chose.

PART TWO

The six things

Six chapters, one each. What it is, why it works, and what it looks like on paper. The templates are real and come with it.

THE SIX

01	**The Focus**	Two or three choices you are genuinely resourcing, with the hardest thing under each named, on one page.
02	**The Numbers**	The few measurements that matter. The metrics that focus attention would change a decision, with the logic and evidence written next to each.
03	**The Ideas**	A written brief, open submission, grouping and voting, so good ideas are not forced to become goals too early.
04	**The Goals**	Outcomes rather than activity, tagged to a choice, with named people, time percentages, dates and what came off their plate.
05	**The Work**	One meeting a week that ends in a decision: continue, change or stop. Confidence rather than progress. An honest ending for every goal.
06	**The Brain**	The record of what you tried, decided, and learned, captured as a byproduct and installed where your AI can read it.

05 The Focus

> **The Focus is two or three choices the company is genuinely resourcing, with the hardest thing about each one named, on a single page.**

Not a strategy document. **A page.** And the page is not a summary of a longer document; it is the thing itself, because a strategy people cannot recall is not operating on anything.

What goes on it: what winning looks like, specifically enough that you would know. Where you are competing and where you have chosen not to. How you intend to win. The hardest thing standing between you and that being real. And what you will not compromise, whatever the pressure.

Why it works

There are two reasons, and the second one is the one people underestimate.

The page says everything. If the choices do not fit, there are too many, and the page says so without anybody having to be the difficult one.

And naming the hardest thing turns a direction into work. A choice with no named difficulty is a wish with a market in it. This is the part most strategies skip, and it is the part that decides whether anything happens.

Our example software company put it like this.

> **The hardest thing.** We can land enterprise logos. We cannot yet keep and grow them. Enterprise net revenue retention is 104%. Our smaller customer base is 118%. We signed 31 enterprise logos last year against a target of 20, and net new revenue barely moved.

> The cause is structural, not effort. **Our onboarding was built for a self-serve customer who never needed us.** An enterprise customer has a rollout, a sponsor with a reputation at stake, and six internal teams, each of whom needs to see the point. We hand them a login and a help centre.

Read that, and you know what the company should be doing, and you know it without being told. **That is what a well-named difficulty does. It removes the need for instruction.**

What it looks like on paper

The one page, in full. This is the real artefact from the template, not a summary of it.

> **WINNING** · Enterprise at 45% of revenue in a £50m business. Enterprise retention at or above 115%. First value in under 14 days with no service engagement.

> **WHERE** · Companies of 200 to 1000 employees, operations-heavy services. UK, DACH, Benelux. Direct sales only. Not self-serve, not the Fortune 500, not the US, not resellers.

> **HOW WE WIN** · The only product in the category an enterprise buyer can deploy without a services engagement.

> **THE HARDEST THING** · We can land enterprise. We cannot keep and grow it. Retention 104 against 118. 31 logos signed, and net new revenue flat.

> **WE WILL NOT** · Promise custom development to win a deal. Discount below £24k to make a logo count. Hide a services requirement inside the word onboarding.

> **THE POLICY** · Fix retention before buying more growth. Sales capacity is flat. Rules out more sellers, the US, and a services team. Rules in the 14-day path, qualifying on deployability, and removing the two-person dependency.

> **THE THREE CHOICES** · **C1** Win the enterprise segment **C2** Keep and grow what we land · **this is the hardest one** **C3** Land the EU market

> **WATCH WEEKLY** · Accounts past day 14 without first value. Above 12, and we are stalling.

Notice the tags. **C1, C2, C3.** Every measure, goal, experiment and bonus weight in the rest of this book carries one of them. It looks like bureaucracy, and it is the opposite: it is the only reason anybody can ask *"what are we doing about C2"* and get a whole answer instead of three documents.

How it goes wrong

It becomes a summary. Somebody produces a beautiful one-pager alongside a forty-slide deck, and the deck stays the real document.

It stays at the top. The page exists, the leadership team wrote it, and no team ever writes a goal against it.

It is agreed, but nobody can recall it. The version I find hardest to fix. Ask three senior people what the company is betting on, and you get three overlapping but different answers. Everybody read it. Nobody can recall it. Usually, that means it is still too long, or the words are ones nobody would say out loud.

06 The Numbers

I once spent an afternoon with a dashboard that had about forty charts on it.

It was good work. Somebody had built it carefully and kept it up to date. When I asked which of the forty had changed a decision in the last quarter, the answer, after a pause, was that they mostly confirmed what people already thought.

A dashboard watches the business. It does not change it. Those are different jobs and only one of them is worth doing.

What Works

> **The Numbers is the small set of measures that would change a decision, arranged so you can see which ones move early and which ones the board reads.**

Two levels, and the split is the whole design.

Lagging measures are the outcomes. They confirm whether the strategy worked. You cannot manage them directly; you can only influence them. These belong to the company.

Leading measures are what you manage. They move first, and they are the ones a team can actually affect. These belong to teams.

Most companies have a pile with both kinds in it and no idea which is which, which is why reviews turn into interpretation.

Why it works, and the two tests

A leading measure earns its place by passing two tests. Both, not either.

One. We have genuine influence over it. Not correlated with our outcomes. Something we can move this week.

Two. We can show that the relationship to the outcome is real, with evidence rather than hope. And we write the evidence down.

That second test is the one that does the work, because it is very hard to fake and almost nobody applies it.

Here is what passing looks like.

> **First value inside 14 days.** Accounts that reach first value inside 14 days renew at 96%. Accounts that do not renew at 71%. Three years of our own data, 340 accounts. **Observed in our history, not assumed.** Confidence: High.

And here is what honesty looks like when a measure does not have that behind it.

> **Onboardings completed without a named specialist.** The only measure of whether this scales at all. **We have no evidence for this one, and we should say so, because we have never done it.** Confidence in the relationship: Low. This is what the experiment tests.

That second block is worth more than the first. Everybody's metric pack looks like the first one. Writing down which of your measures you are least sure about is what makes the whole model believable, and it is what tells you where to spend your testing.

The early warning signal

One more thing on the page, and it is cheap.

> **Live accounts past day 14 without first value, checked weekly. Above twelve and the programme is stalling.**

> The lag between this and the retention number is about eleven weeks. **We need to know in week two, not in the quarterly review.**

Every company has one of these available, and most have never written it down. It is usually a count; it is usually already in a system somewhere, and it usually leads the number the board cares about by two or three months.

How it goes wrong

Correlation dressed as a driver. A number that moves alongside your outcome and cannot be moved by you. It looks like a leading measure, and it is a weather report.

Too many. If reviewing them takes more than twenty minutes, it is a dashboard again.

And nobody edits it. The model is a set of claims about how your business works. Some of them will be wrong. Reviewing it monthly and changing it on evidence is the point; a metrics model nobody has edited in a year is a metrics model nobody has tested.

07 The Goals

The ideas list

Some of the best ideas in your business are not goals yet, and forcing them to become goals is how opportunities and resources get wasted.

To get a great list of ideas that might become goals, **someone has to write the brief.** I spent years in advertising, where the brief is a craft object and somebody's whole job is writing it. Your strategy document and the accompanying meeting are the brief. The words, the measures and how you share them and react to questions all matter.

Teams can develop ideas over days, weeks or months. In product management, it is sometimes called dual-track discovery - goal and discovery run in parallel.

```
The idea ...
```

```
The potential value of the idea …
```

```
The fit with our strategic choices …
```

```
The tests to increase confidence …
```

```
The effort required …
```

```
The decision …
```

And there is a second list nobody has

An idea is something nobody has tried yet. It goes on the list, it gets a cheap test against it, and it waits.

A finding is different. It came out of work you already did, it is real, and it just does not serve the objective you were chasing at the time. Not wrong. Not noise. Orthogonal.

The moment you set a measure, you create that second category by accident. Everything that is true, but does not count.

Most companies have somewhere for the first kind and nowhere at all for the second. Chapter ten is about that, and it is the half that compounds.

Aim, then commit

Two separate acts, and collapsing them is what causes the trouble.

Aiming is deciding the objective and the outcomes, the measures, what would change your mind, and how confident you are to start with. It is thinking, and it is cheap.

Committing is naming who, with what skill, for how much of their time, between which dates, and what they are coming off to make room. It is a resourcing decision, and it is expensive.

Most planning processes set goals and treat them as commitments. **An aimed goal looks exactly like a real one on a slide**, which is why nobody notices until week nine.

What a commit actually looks like

This is the resourcing block from the template, filled in.

NAME	ROLE AND SKILLS	TIME %	FROM	UNTIL	WHAT THEY ARE COMING OFF
Sarah Williams	Head of CS. Owns the path and the certification	40%	Wk 1	Wk 12	The smaller-customer review cycle, paused
Priya Raman	CSM. Runs the cohort and the expansion step	80%	Wk 1	Wk 12	Renewals admin, moved to operations
Tom Okafor	CSM. One of the two people who can currently do this. Turns what he knows into a path anyone can follow.	60%	Wk 1	Wk 8	All new enterprise onboarding, deliberately
Dan Hersey	Operations. Instruments the 14-day window	20%	Wk 1	Wk 4	Board pack automation, delayed a month

The last column is the one everybody skips, and it is the one that means anything. If nothing is coming off, nothing has been decided. The goal has been added to a full plate, and the plate will win.

Look at Tom's row. **Right now, enterprise onboarding works because Tom does it. For eight weeks, his job is to get what he knows out of his head and onto a page somebody else can follow, and then to stop being the person who does it.**

That is a hard conversation. Putting it in a table does not make it easier. It does make it visible, which is the only reason it happens at all, and it is the difference between a plan and a hope.

The sentence nobody wants to hear

The guidance on our template and LLM training files says this, and I would keep it word for word.

> Goals that are wildly important should be resourced for success, which for many means a dedicated team spending eighty per cent or more of its time on achievement and learning. **It might be that you cannot start the goal until the team is available.**

That last sentence is unpopular in a planning meeting, and it prevents the single most common failure in goal setting: starting four things badly instead of two things properly.

Objectives with Outcomes, not activity

The other half of a good goal is that it is quicker to explain.

AN ACTIVITY

Launch the new onboarding flow by the end of the quarter

This is an activity. **You can do it and change nothing.**

AN OBJECTIVE

New enterprise customers reach value on their own, on a path any CSM can run.

This is a great Objective. You cannot achieve it by shipping something, only by it working.

And a note on choosing a few measures of success with targets, because this is where most systems quietly go wrong.

You need to choose a few metrics that, if achieved, would mean that your objective has been achieved.

Targets have three levels.

The starting value is where you are today, written down before you begin, because a target with no starting value is a wish with a decimal point in it.

The target is what success looks like.

And **the stretch** is a number that would be a step change, giving ambition a name and a safety net. We want to unlock the thought, "*What would need to happen to actually hit that*", without being a noose to hang yourself. Innovation, new approaches, learning, and collaboration all live here.

What we do NOT do is score them using decimals and other nonsense.

At the end, the goal gets a grade, judged by a person who was there.

Excellent, good, fair, bad.

Chapter eight has the mechanics. The template has a worked example. The LLM can coach you to create a great goal.

> **And no bonus is ever attached to a team's goal number.**

The moment somebody's pay depends on a number they helped set, they will set a number they are confident they can hit.

> ***They are not being dishonest. They are being sensible, and you built the incentive.***

You probably do pay a bonus, and I am not going to pretend otherwise. Chapter nine is about how to do that without undoing everything above.

How it goes wrong

Goals given to individuals. Goals have leads, but they belong to teams. Give one to a person and a shared outcome quietly turns into a performance record, and people start defending their own piece of it rather than helping with somebody else's.

Goals handed down from above. Teams should write their own, against the company's choices. It takes longer on the day. It is also the difference between a goal somebody owns and a goal somebody defends. You cannot hand a person a number and then be disappointed that they do not feel responsible for it.

Goals for business as usual. The most common way this dies. Somebody points out that customer support matters too, and then finance, and then recruitment. Within a cycle, everything the company does has a goal attached, and none of them means anything.

Goals are for the work that changes the company. Everything that keeps it running belongs in the health measures instead, where it gets watched without being turned into a project.

08 The Work

There is a pattern to a project that fails slowly. Everything is on track. Week after week, on track. Then, somewhere around week nine or ten, it becomes obvious to everybody at once that it is not going to land, and in the review afterwards, it turns out that three people had known since week three.

Nobody lied. **They were answering the question they were asked, which was "are we on track?", and in week three, the honest answer to that question was yes.**

What works

> **One meeting a week that ends in a decision.**

Not a status update. The question is confidence rather than progress, and that difference is the whole chapter.

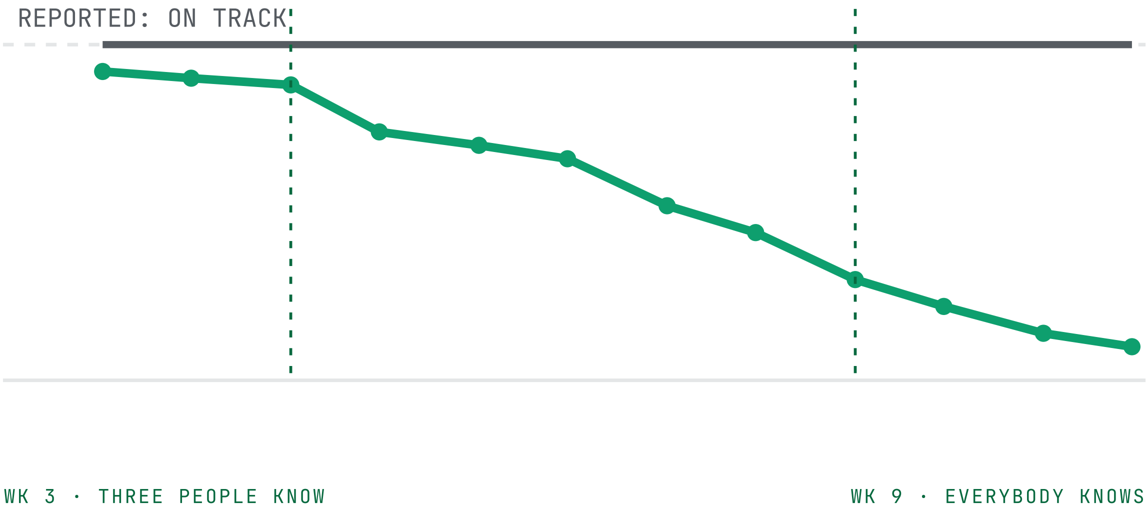
Alongside it: ideas getting tested rather than argued about, and an honest ending for every goal.

Do, test, repeat. Those three are one system, which is why they share a chapter, and we call it execution loops.

Confidence matters, progress follows

Progress is a fact about the past, and it is nearly always fine, because work has been done. Confidence is a judgement about the future, and it moves early.

FIGURE 4 · THE GOAL THAT FAILS SLOWLY



Progress is a fact about the past, and it is nearly always fine.

Confidence is a judgement about the future, and it moves early.

Four questions, same order, every week.

One. For each goal, what is your confidence now, and what would increase it?

Two. So what are we deciding to **do, learn via experiments, and repeat** because it works**?**

Three. Issues list: what's on it, and do we need help?

Four. Should this goal continue?

Then decide

Confidence is a reading. It is not a decision, and this is where most check-ins stop.

Every week, every goal gets one of: **continue, change, or stop.** Written down, with one line of why.

Two rules make it work.

1. **Confidence falling for three weeks running forces a decision rather than another update.**

2. **Confidence is never used against the person who reported it.**

Break the second one, and you will get the number you want to hear for the rest of the year.

One technical note that matters more than it should. On our template, confidence is a word in a column, not a colour in a cell. **A red or amber background cannot be read by a person scanning back through a quarter, and it cannot be read at all by the AI in chapter ten.**

The ending

Every goal gets ten minutes at the end. The end is often the end of the quarter, but could be sooner or later.

How it ended. Reached, stopped early, ran longer, superseded.

A grade. Excellent, good, fair, bad. Judged by a person, not computed. **Nothing lands mysteriously on 0.7.**

What it taught us, in the words a person writing the next goal here would want.

And anything you found that was real but did not serve this goal. This is the one that gets lost, every time. You went looking for one thing and noticed another, and because it was not what you were measuring, nobody wrote it down.

Write it as properties rather than a verdict. Not *it failed*, but what it actually did and under what conditions.

```
The adhesive held at about a tenth the strength we wanted, peeled off without
residue, and could be reused four or five times.
```

A verdict answers one question, once. A set of properties answers questions nobody has asked yet.

Did the leading measure actually move the outcome? If not, the metrics model needs editing, not the team.

And a recommendation: stop, continue, or exploit. Exploit means it worked, and there is more where that came from, and it is the option almost everybody forgets. Most companies file a success and move on while the upside walks away.

09 The Rewards

The truth

> **What gets recognised is what gets repeated, whatever anybody says. So recognition gets designed rather than improvised.**

First, the thing chapter seven owes you

Chapter seven said no bonus is ever attached to a team's goal number. And you pay bonuses. So what makes sense? What is fair? What can be defended?

The shared company goals can be a number. Everybody carries it, and no individual improves their own position by not aligning or lowering their own ambition. Gaming it would take a conspiracy.

The individual half has to be judged. A grade, from somebody who was there, with the reasoning written down. Not a formula sitting on a key result, because that is exactly where sandbagging lives.

If that feels less precise than a formula, it is. It is also the only version that does not quietly teach your best people to aim lower.

The logic and signals

If you pay a bonus, it is a signalling system that also happens to be a payment. Three principles, and they came out of getting this wrong more than once.

Fairness is not uniformity. The same structure for everybody feels fair, and it is not. A salesperson, a finance lead and an engineering director have genuinely different lines of sight.

The question for every role is the accountability radius: what can this person actually influence?

And there is a boundary you should not cross. Attach cash to a goal that needs ambition, experiments and a tolerance for being wrong, and nobody will aim like that again. Those are exactly the goals worth having.

So it splits like this. Everybody shares a stake in the company's outcomes, because those are the outcomes. And the individual part sits on the measures inside their own radius.

A customer success lead, for example, might have a bonus weighted 55 per cent toward company goals and 45 per cent toward personal goals (no team goals). A quota-carrying salesperson carries all of the bonus for the company because their individual performance is already paid through commission, and two personal incentives for one person cancel each other out.

Where team performance measures live

> **Health metrics are your non-negotiables, made measurable.**

The five to ten measures that tell you that a team is in good health on a dashboard, along with relevant measures that come from your strategic choices.

Along with general health metrics, make those measurable and put them on the bonus as a binary gate. If these are not healthy, you miss the bonus.

Team goals, single or cross-functional, are never bonused. These are executing your strategy and pursuing operational excellence and require new, innovative thinking, experimentation, and some risk-taking.

The cheap half, which matters more

Most recognition in a company is unplanned, which means it goes to whatever is most visible. Usually, that is heroics: the person who worked the weekend, the rescue, the save.

This teaches people that the way to be noticed here is for something to go wrong near you.

So write down what you will recognise, and then actually do it. Six things, out loud, by name, every cycle.

An idea tested cheaply, before it made or cost a quarter.

An outcome was reached. The easy one, and the only one most companies do.

A goal was stopped early for good reason. The hardest culture to build.

Help that was given across a team boundary, where nobody's own number improved.

A step-change or a play that can be exploited. Your future advantage.

A team working excellently. The team function and BAU, managed really well.

Then keep the record. **A year of that list shows you exactly what your company has been teaching**, and it is the cheapest diagnostic in this book. Read it back and ask what somebody would conclude about how to get on here.

10 The Brain

Somebody in your company is about to write a goal or an experiment in an area where two or three similar things have already been tried.

They will not know. The people who tried are still employed; some of them are in the building, and the information will not reach the person writing.

And here is the part that should worry you more. Even if somebody did write it down, they still probably will not know. Because finding it requires them to go looking, and you cannot search for an answer you do not know exists.

> **Capture was never the hard part. Matching is.**

The now, not the future

> **Your company needs to remember what it learns, and the memory lives in the tools your teams already use.**

That is the sixth thing, and it is the one that turns the other five from a good quarter into an advantage.

Why is memory an advantage?

Everything else a competitor can buy. The same tooling, the same frameworks, better people if they pay more.

What they cannot buy is the record of what you tried, what you decided, why, and what happened. Because that only happened to you.

And it accumulates. The first year of endings is a folder. The third year is a real asset, because by then nobody starts from nothing. **A copy is a snapshot. A practice compounds.**

Twelve years

Spencer Silver at 3M was trying to make a tougher adhesive. He made one that barely held, peeled clean, and could be reused. Against his objective, a failure.

It sat for five years before Art Fry connected it to the bookmarks falling out of his hymnal. Twelve before the product launched.

Twelve years. There is no planning cycle on earth that holds that.

And notice what saved it. Not a process. A bloke who would not let it go.

Every story like this is the same. Somebody carried the orphan personally, because there was nowhere to put it. That is not a system. That is luck wearing a lanyard.

What is actually in it

Nothing extra. That is the design constraint that makes it survive.

Look back at the last five chapters. The Focus has choices with the hardest thing named. The Numbers has each measure with its evidence written next to it. The Goals have resourcing and what came off. The Work has weekly confidence with the reason, and endings with a grade and what they taught. The Rewards have a record of who was recognised for what.

All of that is already in the memory. Nobody has to write a retrospective document because the reasoning was captured as a byproduct of deciding.

This is why the capture has to be a field rather than a task. Anything that requires someone to sit down afterwards and write it up will happen for two cycles, then stop.

Where the AI comes in

The reason this works now and did not five years ago is that something can carry it.

Your team is already asking an AI about goals and strategy. Out of the box, it gives you the average: a competent blend of everything ever written about goal setting, most of which is why goals fail.

You can change that in about two minutes, and there is a version of ours at the back of this book. It installs into Claude, ChatGPT or Copilot as project instructions plus a set of knowledge files. Then it reviews your goals against a method rather than against the internet average, explains the reasoning rather than just the fix, and tells you that a person rather than a machine is what will actually move things.

And it is deliberately the tip of something larger. The version carries enough judgment to spot what is strong and what is missing in a goal. It does not carry your business. It does not know your choices, your measures, your endings or your evidence, because those are yours and they do not fit in a prompt.

Every company that tried this built a database

Innovation portal. Lessons learned repository. Ideas bank. They all died the same death, which is write-only. People put things in. Nobody ever took anything out.

It was not laziness. Retrieval needs somebody with a live question to go looking, and they do not know the thing they need is in there.

That is the part that has changed, fairly quietly, in about the last three years. Matching a written finding against a live problem statement is precisely what this generation of AI is good at.

Not an innovation brain for your organisation. Something duller and more useful. Findings written as conditions and properties, and something watching new problems go past that says: this was tried in 2023, here is what it actually did, it just was not what we wanted at the time.

That is the Art Fry job. The half that creates the value, and the half no filing cabinet ever did.

Worth being straight about the catch. It only pays when the second question turns up, and you cannot forecast when that is. Which makes it hard to build a business case for and very easy to kill in year one.

It is cheap now, though. And the alternative is the one you are running today, which is hoping somebody in your building is stubborn enough to be Spencer Silver.

Which brings back the C1, C2, C3 from chapter five. Here is what the tags are for.

```
"What are we doing about C2, how confident are we this week, what have we learned,
and what would make us change the strategy?"
```

Answering that needs the hardest thing, two experiments, four team goals, the resourcing on each, this week's confidence with the reason, the evidence behind the leading measures, and the stop condition. In most companies, that is three documents and a person's afternoon.

> **If your installed AI can answer that question, you have a memory. If it cannot, you have files.**

PART THREE

Doing it

11 In two to four weeks

You can install all six in weeks. Not embed them. Install them.

The focus

Produce The Focus. Two or three choices, the hardest thing under each, and what you will not compromise. On one page, in the room, finished before anybody leaves.

Then **the first cut of The Numbers.** For each choice, what should move if the belief underneath is right, and which of those you can move yourself.

Share it with your teams along with an invite to ask questions in person on a date in the diary.

Take a look at the template and the example to remind you what this looks like.

The ideas

> **Teams get together in small groups and add ideas to a list in the suggested structure.**

```
The idea ...
```

```
The potential value of the idea …
```

```
The fit with our strategic choices …
```

```
The tests to increase confidence …
```

```
The effort required …
```

The very shortlist

Ideas are discussed, grouped into themes and voted on, with a consensus being reached. These are discussed with the SLT, and feedback is given.

Some iteration might happen here.

The goals

Take aim. The objective, outcomes, the measures, the issues you expect to come up against, and starting confidence. Named people, time percentages, dates, one accountable owner, and what is coming off to make room.

Expect one goal not to survive this. **That is the process working, not failing.**

These goals are often cross-functional, with some teams dedicated to them. When this happens, make sure the team lead gets support to lead, and the team comes together to become a team ASAP.

The first meet

The first weekly meeting. Four questions, sixty minutes.

One. For each goal, what is your confidence now, and what would increase it?

Two. So what are we deciding to **do, learn via experiments, and repeat** because it works**?**

Three. Issues list: what’s on it, and do we need help?

Four. Should this goal continue?

> ## And the same next week.

And in the same fortnight, cancel the meeting this replaces. Not next quarter. If both still exist in ninety days, you have added an hour to everybody's week and the new one will not survive the first difficult month. This is the part people quietly skip, and skipping it is the best single predictor that none of it holds.

The team health metrics

The five to ten measures that tell you that a team is in good health on a dashboard, along with measures that come from your strategic choices.

Each individual's goals

To support the company's goals and ensure their team operates excellently, what do they need to learn, how do they need to develop, and what numbers can and should they carry? What behaviours should they personify?

Each person is being supported to learn, develop, achieve and adapt to their changing workplace and our changing world.

Launch the bonus plan

Open the **Bonus Calculator**. Put the company gate in first: the one or two things that must be true for anything to pay at all, weighted to the crux. If the hardest thing does not carry the heaviest weight, the plan is telling people something you do not mean.

Then the health gate. A bonus that pays while quality, safety or retention slips is a bonus that bought you a bad quarter. Set the floor and say out loud that it is a floor, not a target.

Individual weights come last, and only for things a person can actually move on their own. Everything else belongs to the team.

> **Team goals, single or cross-functional, are never bonused.**

Those goals are how you execute the strategy and pursue operational excellence. They need new thinking, experiments and some risk. Attach money to them and you will get safe targets, quietly set, and you will never hear the truth in a check-in again.

Then show everybody the sheet. The whole calculation, the weights and the reasoning next to each. A bonus plan people cannot recalculate themselves is a bonus plan they do not believe. Ten minutes in the room now saves an argument in ninety days.

Take a look at the template and the worked example before you fill it in. Most of the work is deciding the weights, and the sheet does the rest.

And one thing in the diary for next month

An hour with the same people, the measures in front of you, and one question written on the agenda: **is any of this telling us the plan is wrong?**

That hour is what picks up the away day's best part, and it is the difference between a strategy that adapts and one that gets reviewed in January.

12 The quarter that goes badly

Everything above works in a good quarter.

The quarter that decides whether you still have a system is the one where the numbers are bad, somebody good resigns, and a customer you cannot afford to lose starts asking difficult questions.

I can tell you what will happen, roughly in this order.

What goes first

The protected hours. Every time. The time needed to move strategic goals when you're fighting fires or your bonus-gated health metrics are at risk.

Then the ideas stop. Nobody cancels them. They just aren't looked at, and the list stops being mentioned.

Then confidence drops. The team is not focused on increasing it.

And then somebody adds a goal mid-quarter with nothing coming off, because the situation is urgent and the rules feel like a luxury. At which point you have your old way of working back, with new words on it.

If you can only hold three things, hold these. The weekly meeting keeps ending in a decision, even if the decision is stop. Anything added has something coming off, in the same conversation, in writing. And somebody stops something well, publicly, because a bad quarter is the best teaching moment you will get and whatever people see becomes the rule.

Let the protected hours go if you have to. They are recoverable. What people learned in a bad quarter is not.

All of this will test your commitment to how you want to operate. The decisions you make will teach your team culture-defining lessons. I've seen it, and it needs to be thought about carefully before you act, which is where having a coach can help you.

Why a year, and not a quarter

Four cycles.

The first teaches the mechanics. The second builds the habit. **The third and fourth are the ones where something goes wrong, and the old behaviour is still available**, and surviving that is the only evidence that it holds.

The thing you personally will find hardest

Not the process. The moment when you find your strategy might not be working and needs to be adapted. A goal that is aligned should be stopped. You are in the room, and stopping it will look like you were wrong.

> **You were. That is what a bet is.**

And what happens in those ten seconds will teach your company more about ambition than anything else you do this year. If you stop it cleanly and say why, stopping becomes possible for everybody else. If you defend it for another cycle, you have taught the room that goals are reputations, and nobody will bring you an honest number again.

13 What it feels like when it is working

You know it has worked when somebody objects to cancelling the weekly meeting.

Not when it runs. Not when attendance is good. **When taking it away would cause an argument**, because at that point people are getting something from it rather than doing it for you.

The other signs, in the order they usually arrive

Somebody outside the leadership team adds something to the ideas list, unprompted. It means the list is understood as a real route rather than a suggestion box, and it is the first evidence that this belongs to the company rather than to you.

A team stops something, and nobody flinches. No defensiveness, no long explanation, no career cost. The reasoning gets written down, and the next goal gets pulled.

And three of your senior people describe what the company is betting on, separately, in roughly the same words. Not because they memorised a page. Because they use it.

What I actually think will surprise you

Everything above is a process outcome, and process outcomes are not why anybody does this.

Here is the one that matters.

> **You will find out your team was better than your system let them be.**

The people you thought were cautious were reading the room correctly, and the room changed. The people you thought did not take ownership were never given anything they could own, only things they could be blamed for. The person who never brought you bad news had watched what happened to somebody who did.

None of that was about their character. It was about what they had seen, and you changed what there was to see.

That is the part I still find genuinely good after a decade of doing this. Not the reporting or the pace, although both come. **It is watching a leadership team discover that they had better people than they thought, and that the difference was never the people.**

And a caution, because this is a book about design

None of this makes anybody happy on its own. A well-designed operating model reduces friction, wasted effort and the low background frustration of working hard on things that do not add up. It does not substitute for decent pay, decent management, or a business with a future.

> **Design what you can design. Do not ask it to carry what it cannot.**

Where this goes, if you want it to

There is more, and it is deliberately not in this book.

Goals that take as long as the outcome takes rather than as long as the calendar allows.

Strategy that updates monthly on what was learned from the work.

Teams that stand up and down around a question rather than a function.

An operating model shaped around what your people actually need to do good work.

All of it is year two, and all of it is easier if you have done the six first, because the six contain their seeds.

Choices with the hardest thing named become an adaptive strategy.

Endings with reasoning break the goal free from the quarter.

Tests become continuous discovery.

> **A company that has run the six well for a year has been practising the next layer without being taught it.**

But that is later, and the six on their own are worth a year.

The templates

The six live in five documents. They come with this book, they are threaded so one company runs through all of them, and you can copy them today.

THE STRATEGY TEMPLATE	THE FOCUS. EIGHT SECTIONS OF THINKING, AND THE ONE PAGE IT COMPRESSES INTO.
The OKR Template	The Goals and The Work. One team goal, tagged to a choice, with resourcing, weekly confidence, the decision, the tests and the ending
The Idea Collection sheet	The brief, open submission, distributed voting and a veto, then drafting
The Bonus Calculator	The Rewards, money half. Company gate, individual measures inside the accountability radius, health gates from your non-negotiables
The AI install pack	The Brain. Instructions plus knowledge files for Claude, ChatGPT or Copilot. The version is described on the next page

A note on how to use them. Fill in the strategy first and do not skip the hardest thing. Everything downstream inherits from it, and a template set built on a vague strategy produces beautifully formatted vagueness.

The AI install pack

Two minutes to install. It works with whatever you use today: goals, rocks, KPIs, or nothing formal.

Create a project in Claude, ChatGPT or Copilot. Paste the instructions file. Add the knowledge files. Then paste a real goal and ask it to review and coach.

What will it do? Review your goals and strategy properly, coach them to better in plain language, explain the reasoning rather than just the fix, and challenge you where the goals reveal a capability gap.

And what it will not do, because I would rather say it here than let you find out. It carries the judgment to spot what is strong and what is missing. It does not carry your business: your choices, your evidence, your endings. Those are the parts that make an AI genuinely yours rather than generically good, and they do not fit in a prompt. **It will sometimes just tell you that this is where the pack stops.**

You can do this without us

I mean it, so here it is properly.

Everything in this book is complete. The six are all here, the templates come with it, and the reasoning is explained rather than hinted at. **A capable leadership team with time and commitment can install this on their own, and some should.**

What we do is build on what you have, get your team onboard and excited, get this installed faster, respectfully challenge, spot and avoid gotchas, act as your own accountability partner, add talent, perspectives, ideas to your own talent.

If that is worth buying, we are one conversation away, and we will tell you straight if you do not need us.

If it is not, you have the whole thing. **Write the page. Cancel the meeting.**

Matt

PIN THIS UP

The six things, on one page

The Focus
01

Two or three choices you are genuinely resourcing, with the hardest thing under each named, on one page.

The Numbers
02

The few measurements that matter. The metrics that focus attention would change a decision, with the logic and evidence written next to each.

The Ideas
03

A written brief, open submission, grouping and voting, so good ideas are not forced to become goals too early.

The Goals
04

Outcomes rather than activity, tagged to a choice, with named people, time percentages, dates and what came off their plate.

The Work
05

One meeting a week that ends in a decision: continue, change or stop. Confidence rather than progress. An honest ending for every goal.

The Brain
06

The record of what you tried, decided, and learned, captured as a byproduct and installed where your AI can read it.

THE AUTHOR

Matt Roberts

Matt has spent a decade inside leadership teams that were working hard on things that did not add up. Most of that time has been spent on the same discovery: the problem described as a people problem is almost always a design problem, and a design can be changed on any day of any week.

He founded ZOKRI to install the six things properly, with the leadership team rather than at them.

ONE CONVERSATION, AND WE WILL TELL YOU STRAIGHT

Matt Roberts
calendly.com/meet-zokri/meet-matt-roberts

Further reading

Two books stand behind the first of the six, and both are worth your time. *Good Strategy Bad Strategy* by Richard Rumelt, on why most strategy documents contain no strategy. *Playing to Win* by Roger Martin, on strategy as a cascade of choices.

Our own library of notes on their work, and on the rest of the field, is free and credited at zokri.com. Nothing in it is ours to charge for.

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