

Company Overview

Vision and Goals (If not on Roadmap)

Flood resiliency and climate change - identifying a wide array of things to improve resiliency to climate change. Improving the health of our lake shore lines

Opportunities: getting a bunch more private landowners onboard / Staff productivity / Sourcing more \$ for the organization / Community engagement / Convincing property owners to get involved in the shoreline reduction / needing 1M in Grant revenue/year



ROADMAP		
Skill	Item	Notes/Detail
NA	Onboarding	Get organized, gain access to tools & resources, dial in partnership & create business plan with Vision, Macro Goals, KPIs, Initiatives, and Initiative Implementation Plans
Financials	5 Year Growth Pro Forma - CLFLWD	Work through financial analysis in order to equip us with ability to make great financial decisions. This will include a quick look at cashflow, debt, pricing per unit, margin per unit and a future forecast.
	Activity Metric Planning/Tracking	Tracking and planning our sales KPIs to control leading success indicators for private landowners (shoreline initiative).
	Cashflow Management/Forecasting	Using Liveplan to proactively manage financials and be able to make great financial decisions/model out scenarios - prioritizing key spending initiatives.
	Grant Sourcing Strategy	Maintaining a database of grants/funding opportunities and cross reference how they align for our priorities.
	Compensation Plans Aligned with CLFLWD Goals	Aligning the right individual incentives to drive performance with macro organizational goals.
Marketing / Converting "Supporters"	Market Penetration Planning - "Don't Mess With Texas" Example	Community research, Ideal Profile(s), Passive and active demand generation strategies for capturing key community support.
	Nurture Campaign Creation	What's the right format to steadily have value add "pings" to our core audiences (newsletter, drip campaigns etc) and which platforms are the right ones to use for this?
	Speaking Events With Strategic Deployment	Content creation, strategic partnerships, and audience management to position ourselves as thought leaders who consistently deliver a value add to our potential prospects.
	Getting CLFLWD On the News	Creating the right event plan and proactive press relationships (booking our "slots") well in advance to get 1-2 high impact events/year.
	"Sales" Skill Coaching	Create the right cadence of group best practice sharing and individual observation/feedback cycles to quickly skill up stellar sales reps.
	"Sales" Team Leadership	Performance culture tactics/organizational optimizations to keep the wind in the team's sales while ensuring they are equipped with the tools to succeed.
Recruiting / Leadership	Organizational Accountability Chart	Clarifying the Roles/Job Functions for every position in the organization. What's the appropriate day to day management necessary from board/what systems to use to lead through this?
	Identify Candidate Persona	Break down the qualitative and quantitative attributes for our ideal candidate.
	Candidate Source Planning	What is our strategy on "pools to fish in" to recruit A players with growth opportunity onto our team? Creating structure and clarity / granular "how to" details around this.
	CLFLWD Employee Retention Strategy	Modernizing the onboarding process and skilling up and retaining new team members up both in their craft as well as integrating them up to our performance culture.
	Attracting + Selling Top Talent	Creating a challenging interview process to get stars in the right seats.
Productivity	Priority Management	Operationalizing the thought process of the highest and best use of our time/our leader's time. Impact/Urgency critical thinking process and tracking to build the right habits.
	Macro & Micro Planning	Setup tool and processes to support easier communication and goals tracking for high level (annual) to granular (weekly/daily). Embrace planning instead of reactive approach to business. Scheduling out 4-8 weeks (solve next week's problems this week).