

The BGEM Compass

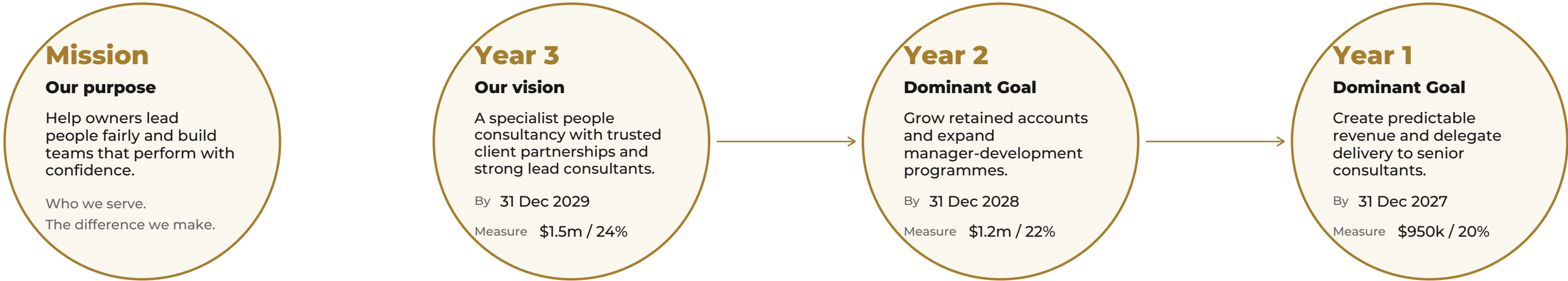
Ecosystem 3 of 3 | 6 staff. Baseline: \$750k revenue, 14% operating margin.

Member Casey Roberts, Founder

Business Peoplewise Consulting

Period Jan 2027 to Dec 2029

Review Every 6 weeks



The 4/16

Four critical outcomes required to achieve the Year 1 Dominant Goal.

Set four measurable milestones for each outcome. Give each milestone a due date.

Critical outcome 1 \$600k retained HR revenue Target / owner Client Lead	Critical outcome 2 \$350k project and training revenue Target / owner Programme Lead	Critical outcome 3 Achieve 20% operating margin Target / owner Founder	Critical outcome 4 Delegate trusted client delivery Target / owner Senior Consultant
1.1 Renew and scope retained accounts Measure 90% retention Due 31 Mar	2.1 Sell manager-development cohorts Measure 4 cohorts booked Due 31 Mar	3.1 Price delivery time into proposals Measure 100% costed proposals Due 31 Mar	4.1 Assign a lead to every account Measure 100% accounts allocated Due 31 Mar
1.2 Deliver first-half retained work Measure \$280k revenue YTD Due 30 Jun	2.2 Complete training and project work Measure \$140k revenue YTD Due 30 Jun	3.2 Control scope expansion Measure 100% changes approved Due 30 Jun	4.2 Review advice quality consistently Measure 10 files reviewed monthly Due 30 Jun
1.3 Grow the retained client base Measure 20 active clients Due 30 Sep	2.3 Build next-quarter commitments Measure \$100k contracted backlog Due 30 Sep	3.3 Improve consultant utilisation Measure 65% billable capacity Due 30 Sep	4.3 Improve client-rated usefulness Measure 90% positive feedback Due 30 Sep
1.4 Meet retained revenue target Measure \$600k recognised Due 31 Dec	2.4 Meet programme revenue target Measure \$350k recognised Due 31 Dec	3.4 Deliver annual operating profit Measure \$190k profit Due 31 Dec	4.4 Transfer routine founder delivery Measure 80% manager-led in Q4 Due 31 Dec

Guiding principles

The behaviours that guide how we deliver.

Principle 1 Understand before advising By this we mean Listen to the people and business context before recommending action.	Principle 2 Fairness with clarity By this we mean Explain expectations and treat each person with dignity.	Principle 3 Confidentiality matters By this we mean Share sensitive information only with authorised people.	Principle 4 Build client capability By this we mean Leave managers better equipped to handle the next situation.
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Fictional example. NZD excluding GST. Circle measures: annual revenue / operating margin after owner salary. Milestone dates are in 2027.