

MEMBER SNAPSHOT



PREPAREDNESS SCALE



TO-DO COMPLETION

_____ # completed / _____ # To-Dos due = _____ % completed

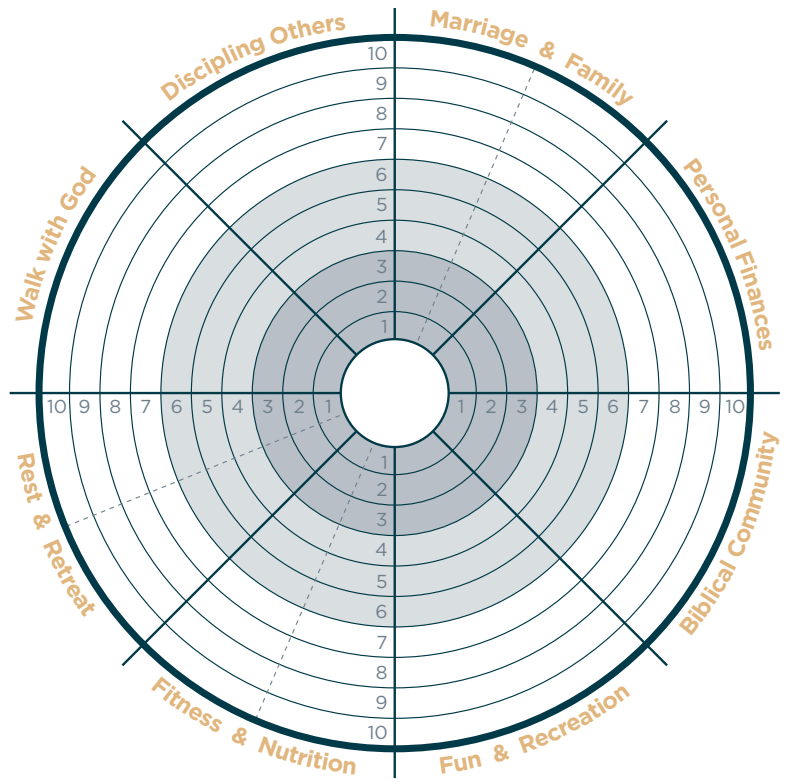
LIFE & LEADERSHIP BALANCE WHEEL

“And whatever you do, in word or deed, do everything in the name of the Lord Jesus, giving thanks to God the Father through him.” **-Colossians 3:17**

Share with the group:

- Your highest areas
- Areas in which you can celebrate improvement
- Your lowest areas
- Areas in which you would like counsel

Big wins and notable events:



5-POINT ALIGNMENT ASSESSMENT

	Behind Target	On Target	Ahead of Target
Revenue Generation Sales, marketing, product line management, and customer relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operations Management Product/service supply chain, fulfillment, technology, and administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organizational Development Recruitment, job selection, talent development, talent management, and succession	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Management Goals, projections, metrics, controls, reporting, and cash management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ministry Kingdom impact/eternal fruit through the business (e.g., salvations, ministry giving, discipleship)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

“Commit your work to the Lord, and your plans will be established.” **-Proverbs 16:3**

Devotion: Let Us Not Grow Weary

Recharging for the Year Ahead

“And let us not grow weary of doing good, for in due season we will reap, if we do not give up.”

Galatians 6:9

In his letter to the Galatians, the Apostle Paul reminds us that doing good is a worthwhile endeavor, even though it can sometimes feel like a burden. Our calling to produce Kingdom fruit alongside organizational results is a significant responsibility. The challenges we face have the potential to weigh us down, make us grow weary, and perhaps even tempt us to concede or compromise.

The pressures of the past few years have brought the weight of our work into sharper focus. The “Great Resignation” of 2021–2023 was driven by a vast number of people in the workforce who decided to give up. What few people realize, however, is that the strain has been felt most acutely by CEOs, executives, and management. A 2022 Deloitte study indicated that nearly 70% of C-suite executives were considering quitting for the sake of their well-being.¹



We can see hope in the midst of hopelessness. We can see peace in the midst of chaos. We have a hope the world does not have. We can see clearly that all things work together for the good of them that love Him and are called according to His purpose.

—Priscilla Shirer, Author, Speaker, and Founder of *Going Beyond Ministries*

Just as batteries need to be recharged, we also need to recalibrate and recharge for the next season in our personal and professional lives.

Both physical exhaustion and mental frustration can weigh on us as leaders. In this passage, while Paul acknowledges the strain, he also exhorts us not to grow weary or give up.² We must resolve to continue fighting “the good fight of faith.”³ As we reflect on the past year and recharge for the new year, we must choose to take up this burden again. God promises a good harvest if we do not give up.

¹ Steve Hatfield, Jen Fisher, and Paul H. Silverglate, “The C-suite’s role in well-being,” Deloitte Insights, June 22, 2022, <https://bit.ly/3qOG4qq>. While organizations like the Barna Group have studied the pressures of the pastorate in recent years (<https://bit.ly/3R0KHZO>), the percentage of CEOs and business owners who have considered a career change due to stress is almost double.

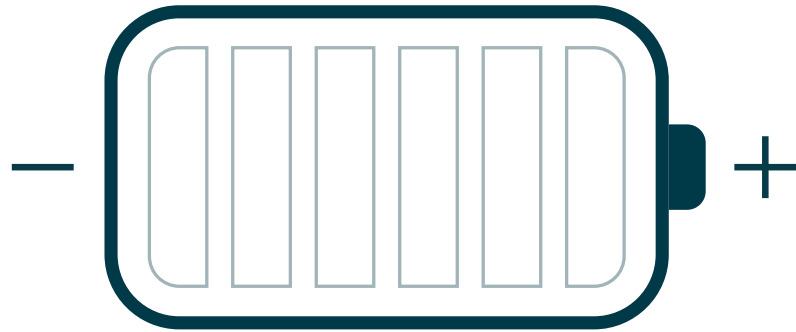
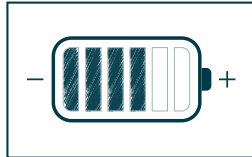
² See the C12 video “Contender” (<https://bit.ly/48gErCC>).

³ 1 Timothy 6:12.



As we close out 2023, how would you rate the current level of charge on your “battery”? Using the graphic below, shade in the appropriate sections to indicate your current level of charge. See the battery on the left side of the graphic as an example.

EXAMPLE:



What does your self-rating tell you about the current state of your soul?

If you continue on the same path, what can you anticipate for your life and leadership in the next season?

What strategies can you use to fight fatigue, manage stress, and continue on the path toward the work God is calling you to pursue?



Based on this exercise, how would you describe the current state of your soul?

Have you ever felt tempted, as the executives did in the Deloitte study, to quit for the sake of your well-being? In which areas of life and work have you felt discouraged and contemplated giving up?

How can we, in this Forum, encourage one another to “not grow weary of doing good” and maintain a healthy charge in our batteries?

Ministry: Reflection and Resolve

An Annual Audit for a Disciple's Success

Every December, we conclude the year by engaging in a time of deep reflection. The areas of our lives and leadership that we evaluate are not optional considerations for followers of Jesus; they are essential elements for flourishing. Although we will never reach perfection, we can intentionally pursue balance and improvement. An honest assessment of where we are and who we want to be will shape how we focus on the year to come—while, at the same time, supporting our peers and inviting them to encourage us as well.



The unexamined life is not worth living.
—Socrates



For what does it profit a man to gain the whole world and forfeit his soul?
—Jesus Christ



If you can't fly, run. If you can't run, walk. If you can't walk, crawl, but, by all means, keep moving.
—Martin Luther King Jr.¹

A business that is facing financial setbacks or rapid turnover is susceptible to failure—regardless of strong branding, a clear vision, or the best leadership intentions. In the same way, a leader with an unstable Balance Wheel is jeopardizing everything that matters—regardless of the perceived success of the business. Before we launch into the new year, we would be wise to reflect on this past year and allow God to bring awareness of where we can celebrate health and where we can focus on improvement.²



How easy or difficult is it to prioritize what truly matters in your life? Why?

The Measure of Success

God did not call us into a “pie chart life,”³ in which we segment the areas we think He can influence and those we think He cannot. He wants us to invite Him into every area of our lives so that our whole, integrated life reflects Him and brings Him glory. C12's Life & Leadership Balance Wheel is a diagnostic tool that helps us reflect on the key areas of our lives that God calls us to steward, as we all will be assessed on them one day.⁴ The Balance Wheel also serves as an accountability tool for our peers, helping us stay on track.

¹Martin Luther King Jr., “What Is Your Life's Blueprint?,” speech, Barratt Junior High School, October 26, 1967, Philadelphia, PA, YouTube video, 20:38, <https://www.youtube.com/watch?v=kmsAxX84cjQ>.

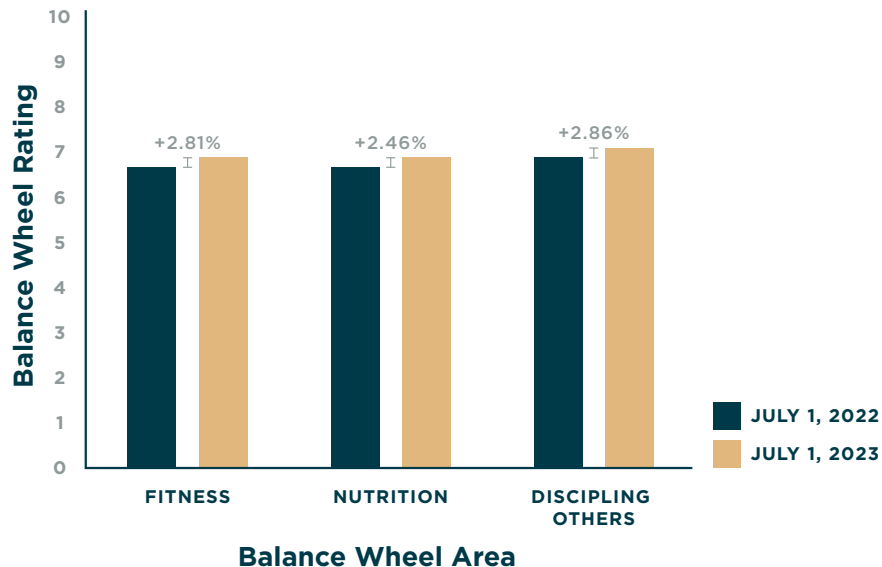
²Greg Saliccioli, *The Enemies of Excellence: 7 Reasons Why We Sabotage Success* (Spring Valley, NY: The Crossroad Publishing Company, 2011).

³Brant Hansen, *Unoffendable: How Just One Change Can Make All of Life Better* (Nashville: W. Publishing Group, 2015), 59.

⁴Romans 14:12; 2 Corinthians 5:10; 1 Peter 1:17–19.

As results-driven leaders, we rightly emphasize the principle attributed to Peter Drucker that “what gets measured gets managed.” Every month, when we gather to evaluate our lives and leadership using the Balance Wheel, we have the opportunity to honestly assess where we can make improvements. C12 survey data confirms that the discipline of monthly measurement is leading to improvement in the lives of members.

By comparing the data that active CEO members submitted for their Forums in July 2022 and July 2023, we identified improvements in 10 out of the 12 areas measured by the Balance Wheel.⁵ The categories that demonstrated the most significant growth were Fitness, Nutrition, and Discipling Others (which are all areas that were addressed in recent curriculum segments):



With this track record of success in mind, we can approach the following assessments with confidence, knowing that drawing our attention to these critical aspects of our lives marks the first step in our journey of improvement.



Renewal through Reflection: A Journey to Flourishing



C12 member: Joelle Marquis, Senior Partner and President

After enduring a challenging year in 2022, Joelle Marquis sensed that God was prompting her to take a time of retreat to prepare for the upcoming year. Her retreat time was both restorative and insightful. Using C12’s Balance Wheel, she gained insights into the growth opportunities that God was calling her to in the next season.

Company: Arsenal Capital Partners

Employees: 94

Industry: Private Equity

Year Established: 2000

Headquartered: New York, NY

Years in C12: 5

⁵In the C12 App, you can input monthly Balance Wheel assessments (Snapshot > Current Month) and track your progress over time (Dashboard > Snapshot & Todos > Annual Snapshot Summaries > Year).



Balance Wheel Audit

Read the descriptions below for each area of the Balance Wheel and mark the box beside each statement that best reflects your life and habits in 2023. Then, assess your gaps and define a goal for how you would like to improve in that area in 2024.

+ Usually

+/- Sometimes

- Rarely



Walk with God

Our walk with God is our personal relationship with Him, which is intended to be the primary relationship of our lives.⁶ Walking with our greatest Friend, we enjoy the blessings of listening to Him, sharing our concerns and joys with Him, receiving His help and encouragement, and expressing our love for Him.⁷ We need to nurture our relationship with God to remain close to Him, as we would with any other relationship.⁸ As we walk in step with Him, our desires will grow more in alignment with His will.

“You shall love the Lord your God with all your heart and with all your soul and with all your mind. This is the great and first commandment.” —Matthew 22:37–38

	+	+/-	-
I begin and end my day in dedicated time with the Father. ⁹			
I read and meditate on God’s Word ¹⁰ daily.			
I talk with God in prayer throughout my day.			
I reserve time for other spiritual practices (i.e., meditation, silence, solitude, etc.) throughout the year.			
I seek God’s will in my decisions.			
I see the fruit of the Spirit growing in my life. ¹¹			

My goal for my Walk with God in 2024 is:



Priorities are what we do; everything else is just talk.

—Buck Jacobs

⁶ John 15:5.

⁷ Matthew 7:7–10; Billy Graham, “What Does It Mean to Walk with God?,” Answers by Billy Graham, Billy Graham Evangelistic Association, November 3, 2017, <https://bit.ly/3BMTVDO>.

⁸ James 4:8. See also Lilian Radke’s CURRENT’19 talk, “Scaling 10X Without Going Crazy” (<https://bit.ly/3PEInH2>).

⁹ See *The Most Important Hour*, by Buck Jacobs, for a quiet-time journal and method available from C12 (<https://bit.ly/3Cmnbhz>).

¹⁰ See the C12 ministry segment “Biblical Fluency” (March 2023).

¹¹ Galatians 5:22–23.



Discipling Others

As Christians, our responsibility to further the Kingdom of God is twofold: *evangelism*—introducing others to the truth of the gospel—and *discipleship*—teaching Christians how to follow Jesus and obey God’s commands.¹² The essence of discipleship is found in the question, “Are we engaged in teaching others to follow Jesus as we are learning to follow Him ourselves?” When someone first becomes a Christian, he or she needs help learning how to think, feel, and act in order to grow into a mature follower of Jesus who can then make disciples.¹³ If Jesus instructed His followers to create disciples, and a disciple is defined as someone who follows their master’s guidance, then can we truly consider ourselves to be disciples if we are not actively making disciples?

“Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, teaching them to observe all that I have commanded you.” —Matthew 28:19–20

	+	+/-	-
I pray for others’ salvation.			
I faithfully share the gospel with unbelievers.			
I make an intentional effort to encourage specific individuals in their faith.			
The truth of Christ is the foundation of my spiritual mentorship.			
I help believers mature in their faith.			

My goal for Discipling Others in 2024 is:



Marriage and Family

For those who are married, the relationship with our spouse ranks as our most important relationship next to our relationship with God.¹⁴ Paul describes the bond between a husband and wife as illustrative of the covenant relationship between Christ and the Church.¹⁵ Additionally, we are biblically responsible for stewarding relationships with our children¹⁶ and our parents.¹⁷ Other family members follow in importance. In some situations, family responsibilities may also include managing relationships with siblings and extended family.

“However, let each one of you love his wife as himself, and let the wife see that she respects her husband.” —Ephesians 5:33

	+	+/-	-
I date my spouse regularly and love them as Christ instructs. ¹⁸			
I prioritize quality time with my spouse and children.			
I invest in my family spiritually, leading at home as diligently as I do in business.			
My family would agree that I balance my time and focus.			
I am intentional about honoring my parents.			

My goal for my Marriage and Family in 2024 is:

¹² John Piper, “What Is Discipleship and How Is It Done?,” *Desiring God*, January 25, 2016, <https://bit.ly/3CmogG9>. See also the C12 ministry segment “The Power of Questions” (July 2023).

¹³ Acts 18:24–26; 2 Timothy 2:1–7; Titus 2:2–3. See also the C12 devotion “Making Disciples” (February 2022).

¹⁴ Watch Kris DenBesten’s CURRENT’21 talk, “Turning Over Ownership” (<https://bit.ly/3OCwgaN>) and Emerson Eggerichs’s CURRENT’19 talk, “Marriage in High Stress, High Growth, High Mission Leadership” (<https://bit.ly/44HyhZm>). See also the C12 ministry segment “The Ministry of a Leader’s Marriage” (August 2019).

¹⁵ Ephesians 5:22–33; 1 Peter 3:7.

¹⁶ Proverbs 22:6; Ephesians 6:4. See also Jason Brown’s CURRENT’23 talk, “Our Father’s Business” (<https://bit.ly/3RoH3Z9>).

¹⁷ Exodus 20:12; Ephesians 6:1–3.

¹⁸ Ephesians 5:22–23. See also the C12 ministry segment “The Ministry of a Leader’s Marriage” (August 2019).



Personal Finances

All of our resources come from and belong to God. Stewarding our resources is more than just tithing 10% of our income; stewardship encompasses 100% of what He places in our hands.¹⁹ God cares about how we manage, save, spend, and give.²⁰ Our goal is that He would consider us “good and faithful,” just as the master considered the good steward in the parable of the talents.²¹

“Honor the Lord with your wealth and with the firstfruits of all your produce.” —Proverbs 3:9

	+	+/-	-
My money management reflects God’s values.			
I tithe, save, and maintain a positive cash flow.			
I am free of consumer debt.			
I give sacrificially and cheerfully.			
My giving is a natural outpouring of what God has graciously given to me.			

My goal for my Personal Finances in 2024 is:



Biblical Community

Over the past few years, many people have reduced their social interactions and stopped attending church in person, but God desires us to experience life with Him and with others. Authentic relationships help us overcome self-dependence, isolation, and superficial socializing by offering compassion, encouragement, and accountability.²² It is only in community with other Christians that we can fully experience the blessings of life in Christ.²³

“And let us consider how to stir up one another to love and good works, not neglecting to meet together, as is the habit of some, but encouraging one another, and all the more as you see the Day drawing near.” —Hebrews 10:24-25

	+	+/-	-
I regularly attend worship services in person.			
I am an active member of a small group or Bible study that provides accountability.			
My C12 Business Forum peers would say that I am growing as a person and as a leader.			
I make time to meet regularly with Christian friends to discuss our lives and pray together.			
I enjoy healthy, transparent relationships with other followers of Jesus.			

My goal for Biblical Community in 2024 is:

¹⁹ Psalm 37:21; Matthew 6:24; 2 Corinthians 9:7-8; 1 Timothy 5:8; 6:6-10, 17-19; Revelation 3:17.

²⁰ See the C12 devotion “A Life of Great Gain” (August 2022); the C12 ministry segment “Stewarding Our Father’s Portfolio” (April 2017); and the books *God and Money: How We Discovered True Riches at Harvard Business School*, by John Cortines and Gregory Baumer, and *The Treasure Principle*, by Randy Alcorn.

²¹ Matthew 25:14-30.

²² Hebrews 3:13.

²³ See the C12 devotion “Meeting Together” (May 2022). See also Psalm 133:1; Proverbs 27:17; Romans 12:4-5; Ephesians 4:15-16.



Fun and Recreation

Scripture encourages us to have a joyful heart.²⁴ We must be careful to avoid the trap of being “all work and no play” or striving to do life *for* God to the exclusion of enjoying life *with* Him.²⁵ A critical element of a healthy, balanced life is a rhythm of recreation that brings us joy and refreshment.²⁶ As God’s children, we are made in His image, each with unique interests and abilities, and He is delighted when we enjoy the gift of His good creation.²⁷

“And I commend joy, for man has nothing better under the sun but to eat and drink and be joyful, for this will go with him in his toil through the days of his life that God has given him under the sun.”
—Ecclesiastes 8:15

	+	+/-	-
I regularly make time to enjoy hobbies or recreational activities.			
My family and I do fun things together.			
Those closest to me would say that I let myself have fun.			
I have a regular cadence of pursuing physical and emotional renewal.			

My goal for Fun and Recreation in 2024 is:

Fitness and Nutrition



God created our physical bodies to be the vessels of His Spirit that accomplish His purposes. Self-care is not self-centered when it is done to care for the body entrusted to us by God and inhabited by the Holy Spirit.²⁸ We honor God with our bodies²⁹ when we take care of them through exercise, rest, nourishing foods, and health care in order to function as He designed.³⁰

“Or do you not know that your body is a temple of the Holy Spirit within you, whom you have from God? You are not your own, for you were bought with a price. So glorify God in your body.”
—1 Corinthians 6:19-20

	+	+/-	-
I have an intentional plan in place for managing my caloric intake and ensuring balanced nutrition.			
My exercise routine or physical activity is frequent and consistent.			
I am maintaining a healthy weight and feel good physically.			
I have routine physical exams.			

My goal for my Fitness and Nutrition in 2024 is:

²⁴ Proverbs 17:22.

²⁵ Ecclesiastes 2:22-25.

²⁶ See the C12 business segment “Burnout in Business” (July 2019) and the C12 ministry segments “Restored by Rest and Retreat” (July 2019) and “Retreating to Advance” (August 2023).

²⁷ Ecclesiastes 3:12-13; 5:18-20.

²⁸ Daniel 1:8-21; 1 Corinthians 3:16; 9:24-27.

²⁹ See C12 ministry segment “Healthy Habits, Holy Lives” (May 2023). See also the C12 video “The Transformative Power of Faith, Food, and Fitness” (<https://bit.ly/488ODx2>).

³⁰ See the video “C12 Group’s 2015 National Leaders Conference - Managing Workplace Healthcare,” by Bill Cox, James Ogletree, and Todd Thames (<https://bit.ly/3QGqNIZ>), and the C12 ministry segment “Cultivating a Wellness Culture at Work” (August 2017).



Rest and Retreat

We should not feel guilty about taking time away from our work responsibilities when needed. God created us with human limitations that require both rest and retreat for us to flourish. He calls us away from our times of labor with an invitation to fellowship with Him and receive His love, healing, peace, and guidance.³¹ Rest restores us and guards against exhaustion.³² Retreat combats the temptation of pursuing busyness.³³ Jesus modeled both rest and retreat during His time on earth.

“Do not toil to acquire wealth; be discerning enough to desist.” —Proverbs 23:4

	+	+/-	-
I sleep at least seven hours each night.			
I build margin into my day so that I can care for my body, mind, soul, and spirit.			
My weekends include intentional times for Sabbath rest and restoration.			
My weekdays include short windows for silence and solitude.			
My calendar has regular times for intentional retreat (i.e., extended time with God) outside normal daily rhythms.			

My goal for Rest and Retreat in 2024 is:



In which area are you most pleased with your progress this year? What wins can you celebrate?

In which area would you like to see the most growth over the next year? What steps do you plan to take to achieve that growth?



Buffalo Culture Exercise

Buffalo leaders are always moving.

If not addressed by next year, which element of the Balance Wheel will most threaten your momentum as a leader? What will you commit to do in order to improve in that area?



During your CEO/key player sync meeting, discuss the following:

- What can we celebrate that God has done in and through us this year?
- What are our strengths and weaknesses on the Balance Wheel? What is the one area we would like to be held accountable for in the next year?
- Where are there gaps that can become goals in the new year?

³¹ Matthew 11:28–30; Mark 6:30–31.

³² Exodus 20:8–11; Psalm 127:2; Isaiah 30:15. See also the C12 business segment “Burnout in Business” (July 2019); the C12 ministry segment “Restored by Rest and Retreat” (July 2019); and the book *Practicing the King’s Economy: Honoring Jesus in How We Work, Earn, Spend, Save, and Give*, by Michael Rhodes and Robby Holt.

³³ See C12 ministry segment “Retreating to Advance” (August 2023).



Use the Balance Wheel Annual Goal Planning worksheet in **Appendix A** to establish goals for the new year that will help you reach your desired outcomes (page 13).

From Glory to Glory

The Apostle Paul said that those who fix their eyes on the glory of the Lord are being transformed into His image one degree at a time.³⁴ Who are you becoming in light of how you invest your time? Are you growing in Christlikeness in all areas of life? Who are others becoming by knowing and doing life with you?³⁵



But here's a truth we don't always think about: God's glorious agenda for our ambition, like his glorious gospel, begins not with what we achieve but with who we are.

—Dave Harvey, *Rescuing Ambition*³⁶

Diligent stewards not only make great plans but also embrace disciplines to reflect on and adjust those plans.³⁷ Pursuing God's priorities for our lives and trusting Him with the results will reap rewards for years to come.³⁸

DO > talk



Priorities are what we do. Everything else is just *talk*.

Record your To-Dos at the bottom of page two and in the C12 App.

³⁴ 2 Corinthians 3:18.

³⁵ See "Becoming," a video about one company's perspective on stewarding people (<https://bit.ly/3qveXjS>).

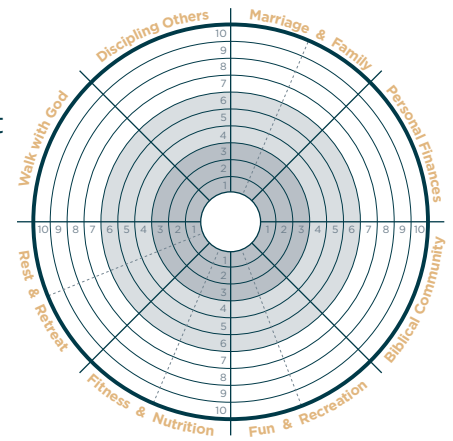
³⁶ Dave Harvey, *Rescuing Ambition* (Wheaton, IL: Crossway, 2010), 67.

³⁷ Green Peak Partners, "New Study Shows That Boards and Committees Should Search for 'Self-Aware' Leaders and CEOs," HR.com, September 9, 2010, <https://bit.ly/3eaLill>; Joe Carter, "Using Self-Examination for Spiritual Formation," The Gospel Coalition, December 3, 2016, <https://bit.ly/3Sg9eHn>; and "Korn Ferry Institute Study Shows Link Between Self-Awareness and Company Financial Performance," Korn Ferry, June 15, 2015, <https://bit.ly/3LVRW00>.

³⁸ Clayton M. Christensen, "How Will You Measure Your Life?," *Harvard Business Review*, July–August 2010, <https://bit.ly/3ULE4Jz>. See also Romans 12:2 and 1 John 2:17.

Balance Wheel Annual Goal Planning

Perfection is not attainable or sustainable, but aiming for a “perfect 10” in each area of the Balance Wheel embraces a continuous journey toward a more abundant life. Meditate on the following questions and complete the table with realistic but ambitious goals that will help you reach your end-of-year vision.



- What would success look like in each area of my life?
- What is a skill I need to learn, a change I need to make, or a habit I need to break in order to grow in my likeness to Jesus?
- Which of these desired outcomes is most critical for me to achieve? Indicate the top three priorities.

Top Priorities (1-3)	Area of the Balance Wheel	Desired Outcome What does success/health look like?	Action Steps How will my growth be measured and achieved?	Accountability How will I be held accountable for achieving this goal?
	Walk with God			
	Discipling Others			
	Marriage			
	Family			
	Personal Finances			
	Biblical Community			
	Fun and Recreation			
	Fitness			
	Nutrition			
	Rest			
	Retreat			

Business: Presenting Next Year's Plan

Developing a “Rallying Cry” with the Input of Peers

We often set personal resolutions and intentions for investment at the turn of the calendar year. As we apply this practice to our businesses, it is useful to remember Patrick Lencioni’s wise observation:¹

“Most organizations I’ve worked with simply have too many top priorities to achieve the level of focus they need to succeed. [...] The end result is almost always a lot of initiatives being done in a mediocre way, and a failure to accomplish what matters most. This phenomenon is best captured in that wonderful adage, ‘If everything is important, nothing is.’”

Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business*

Lencioni is suggesting that we must examine everything we do through the lens of *priority*,² ensuring our focus is not diluted by pursuing too many goals. This month marks the moment in our C12 calendar when we articulate a 2024 annual primary objective—or what Lencioni calls a “thematic goal” or “rallying cry.”³ Achieving clarity on an annual primary objective will inform the future prioritization of our products and processes.

Our C12 Business Forum presents us with the unique opportunity to receive other perspectives—not from strangers but from trusted peers who know us, understand our businesses, want to see us succeed, and speak from experience. The power of peers is strong.⁴ We gain the greatest value when we deliver honest feedback *and* embrace the counsel we are given.



What have been some of the most powerful moments in this Forum over the past year? Why were those moments so significant?



Buffalo Culture Exercise

Buffalo leaders enjoy a herd mentality.

How can we recreate those powerful moments of challenge and encouragement today?

¹Patrick Lencioni, *The Advantage: Why Organizational Health Trumps Everything Else in Business* (San Francisco: John Wiley & Sons, 2011), 119.

²In his popular book *Essentialism: The Disciplined Pursuit of Less*, Greg McKeown highlights the irony that the word *priority* referred to a singular idea for more than 400 years. In the 20th century, we started accepting *priority* to mean a plurality of the “most important” ideas.

³Lencioni, *The Advantage*, 121. See also *At the Table with Patrick Lencioni*, episode 21, “What’s Your Rallying Cry?” (<https://bit.ly/3Q9rbsB>).

⁴See the following C12 videos on the value of peer feedback: “The Power of Peers” (<https://bit.ly/45q0fd7>) and “Peer Perspective: Paving a Path toward a Bright Future” (<https://bit.ly/3POjNmn>).

Setting 5-Point Alignment Matrix Targets for 2024

As we enter into a new year, let's start by defining our targets for the year ahead across every area of the 5-Point Alignment Matrix (5PAM).

Looking Back at 2023

Every month in our Forums, we self-report our progress in the areas of Revenue Generation, Operations Management, Organizational Development, Financial Management, and Ministry. A look back at what we reported each month in 2023 will reveal which areas of the business are thriving, which are surviving, and which need reviving.

Take a moment to understand:

- Which area of the business will finish behind target this year? What are the implications of that outcome?
- Which area of the business will finish on or ahead of target for this year? What are the implications of that outcome?
- Which area of the business most critically needs improvement in the next year?

Looking Ahead to 2024



See **Appendix B**, the 5-Point Alignment Matrix (5PAM) Accountability Worksheet, to establish the annual strategic objectives you will measure throughout the year in your monthly reporting (page 21).

- Have you identified annual strategic objectives and goals/KPIs for each area of the 5PAM?
- Is each objective defined according to the SMART and FAST frameworks?⁵



What metrics do you use to determine whether you are on target, ahead of target, or behind target in your monthly 5-Point Alignment Matrix assessment?

How do you want this group to hold you accountable to your 5PAM objectives in 2024?

⁵SMART goals are **s**pecific, **m**easurable, **a**ctionable, **r**ealistic, and **t**ime-bound. FAST goals are **f**requently-discussed, **a**mbitious, **s**pecific, and **t**ransparent. See pages 30–31 in C12's Strategic Planning Guide for a detailed explanation of these frameworks and how they work together (C12 App > Member Resources > General > Tools > 2024 C12 Strategic Planning Guide).

Crafting an Annual Primary Objective

In C12’s BaaM Strategic Planning Framework, we refer to the overarching organizational focus for the year as the annual primary objective. The annual primary objective answers the question, “What is most important *right now*?” Or, to put it another way, “If we accomplish only one thing in the next 12 months, what would we want it to be?”⁶

BaaM Strategic Planning Framework⁷



An annual primary objective flows out of the company’s multiple annual strategic objectives across the 5PAM. It identifies the most important priority for the company that unifies, enables, or excites all the other objectives. When leaders identify a single top priority, they create a sense of alignment and focus among the leadership team, which will ultimately allow all aspects of the business to flourish.

⁶Lencioni, *The Advantage*, 119–131.

⁷See the C12 business and ministry segment “A Step-by-Step Process for Strategic Planning” (September 2023) and C12’s Strategic Planning Guide in the C12 App (Member Resources > General > Tools > 2024 C12 Strategic Planning Guide).

An **annual primary objective**⁸ is . . .

- **Singular:** The one most important thing to create alignment and momentum.
- **Temporary:** Achievable within a clear time boundary.
- **Qualitative:** An inspirational and aspirational rallying cry. We should resist putting numbers into an annual primary objective. Measures will come later.⁹
- **Shared across the leadership team:** Company leaders must take collective responsibility for the annual primary objective. Leaders will be expected to support initiatives that are aimed at achieving the annual primary objective—even if these initiatives fall outside of their areas of ownership.

Annual Primary Objective Examples:

- Rebuild credibility with customers.
- Make the new partnership work.
- Attract repeat business.
- Build the team.
- Love and care for each other.



One of the best ways to identify an annual primary objective is to answer the question, “If you accomplish only one thing during the next 12 months, what would you want it to be?” or “What is most important right now?” Imagine this time next year when you will be reflecting on the previous 12 months. Assuming you have proven to be a “good and faithful servant,”¹⁰ what would you like the headline of your annual report to be in December 2024?

Your Company’s 2024 Headline:

Annual Primary Objective Presentations

Crafting an annual primary objective is a critical milestone in the strategic planning process.¹¹ As we proceed, prudent planners will heed Solomon’s wise advice:

“Without counsel plans fail, but with many advisors they succeed.”

Proverbs 15:22

⁸ Lencioni, *The Advantage*, 122.

⁹ Lencioni says, “The thematic goal should almost never be established with specific numbers attached to it. The opportunity for putting quantitative measures around a thematic goal comes later, and it should not be done too early because it can too narrowly prescribe what needs to be achieved and limit people’s ability to rally around it.” *The Advantage*, 122.

¹⁰ Matthew 25:23.

¹¹ See the C12 business and ministry segment “A Step-by-Step Process for Strategic Planning” (September 2023).



Complete the Annual Primary Objective Presentation worksheet in **Appendix C** to prepare for your presentation to your peers (page 23).



Break into groups of two or three and take turns presenting your 2024 headline and the annual primary objective you are considering.

After you present, ask your peers, “Is this annual primary objective the right focus for my company, or do you see a more critical opportunity for us?”



During your CEO/key player sync meeting, discuss your 5PAM business targets for 2024 and your current thoughts for an annual primary objective (or rallying cry) for the company:

- What 5PAM metrics would you like your key players to report on in 2024 (refer to **Appendix B**)?
- What do key players think about the company’s annual primary objective (refer to **Appendix C**)?
- What feedback did you receive from your Forum on your company’s annual primary objective?

Alignment, Stewardship, and Vision

Proverbs 29:18 (KJV) says, “Where there is no vision, the people perish.” Our annual primary objective should function as a vision to motivate our teams around a shared purpose. Once an annual primary objective has been developed and articulated, we must communicate it to a broad swath of the organization to align and focus the team.¹²

As faith-driven leaders, it is our heart to align with God’s will by stewarding people and resources well. With a singular focus on a God-honoring annual primary objective, we will be well-positioned to encourage flourishing workplaces¹³ that produce results, engage employees, serve customers, and glorify God.



Priorities are what we do. Everything else is just *talk*.





Record your To-Dos at the bottom of page two and in the C12 App.

¹² See the C12 business segment “Executing Our Strategic Plans” (October 2022).

¹³ Al Lopus, “Today’s Workplace: A Flourishing Culture Matters Now More Than Ever,” JoinC12.com, January 16, 2023, <https://bit.ly/456YFw5>.

5-Point Alignment Matrix (5PAM) Accountability Worksheet

Complete the table below with the strategic objectives that you want to accomplish in 2024. These goals will inform your monthly 5-Point Alignment Matrix assessment for your C12 Business Forum.

	Annual Strategic Objective	Metrics and Milestones	Person Responsible	Due Date/ Review Frequency
 REVENUE GENERATION				
	Define "On Target":			
 OPERATIONS MANAGEMENT				
	Define "On Target":			
 ORGANIZATIONAL DEVELOPMENT				
	Define "On Target":			
 FINANCIAL MANAGEMENT				
	Define "On Target":			
 MINISTRY				
	Define "On Target":			

Annual Primary Objective Presentation



Succinctly share the annual primary objective you are considering for your company for 2024, along with the strategy for how your team will achieve it.

REFLECT: The annual primary objective for 2023 was:

RESOLVE: The annual primary objective for 2024 is:

Which dimensions of the 5-Point Alignment Matrix does this annual primary objective support?
(Check all that apply.)

- REVENUE GENERATION** **OPERATIONS MANAGEMENT** **ORGANIZATIONAL DEVELOPMENT** **FINANCIAL MANAGEMENT** **MINISTRY**

WHY: What will inspire you to complete this annual primary objective in the coming year (i.e., tie into your mission)?

Is there a specific verse that might inspire you to accomplish this annual primary objective?

HOW:

List three key steps to achieve this annual primary objective:

METRICS OF SUCCESS

Key Performance Indicators (KPIs):

GREATEST ANTICIPATED CHALLENGE OR CONSTRAINT:

ACCOUNTABILITY:

Who:

How:

Frequency:

Collect peer feedback on concerns, blind spots, counsel, and recommendations:

ADDITIONAL RESOURCES

Devotion: Let Us Not Grow Weary

Scriptures:

Galatians 6:9; 1 Timothy 6:12

Videos:

“Contender” (C12 YouTube)

Ministry: Reflection and Resolve

Scriptures:

Exodus 20:8-12; Psalm 37:21; Psalm 133:1; Proverbs 17:22; Proverbs 22:6; Ecclesiastes 2:22-25; Ecclesiastes 3:12-13; Daniel 1:8-21; Matthew 7:7-10; Matthew 11:28-30; John 15:5; Romans 12:2-5; Romans 14:12; Galatians 5:22-23; 1 Timothy 6:6-10; 2 Timothy 2:1-7; Hebrews 10:24-25; 1 John 2:17

Books:

The Enemies of Excellence: 7 Reasons Why We Sabotage Success, by Greg Saliccioli

The Most Important Hour, by Buck Jacobs

God and Money: How We Discovered True Riches at Harvard Business School, by John Cortines and Gregory Baumer

Garden City: Work, Rest, and the Art of Being Human, by John Mark Comer

Resilient: Restoring Your Weary Soul in These Turbulent Times, by John Eldredge

From Strength to Strength: Finding Success, Happiness, and Deep Purpose in the Second Half of Life, by Arthur C. Brooks

Don't Waste Your Life, by John Piper

Videos:

“Turning Over Ownership” – Kris Denbesten (CURRENT’21 On-Demand)

“Marriage in High Stress, High Growth, High Mission Leadership” – Emerson Eggerichs (CURRENT’19 On-Demand)

“Our Father’s Business” – Jason Brown (CURRENT’23 On-Demand)

“The Transformative Power of Faith, Food, and Fitness” – Tony Holt (C12 YouTube)

Previous C12 Segments:

“Retreating to Advance” – August 2023, Ministry

“Healthy Habits, Holy Lives” – May 2023, Ministry

“Biblical Fluency” – March 2023, Ministry

“The Ministry of a Leader’s Marriage” – August 2019, Ministry

“Restored by Rest and Retreat” – July 2019, Ministry

“Cultivating a Wellness Culture at Work” – August 2017, Ministry

“Stewarding Our Father’s Portfolio” – April 2017, Ministry

(Resources continue on the next page.)

Business: Presenting Next Year's Plan

Scriptures:

Matthew 25:23

Books:

The Advantage: Why Organizational Health Trumps Everything Else in Business, by Patrick Lencioni

Essentialism: The Disciplined Pursuit of Less, by Greg McKeown

The ONE Thing: The Surprisingly Simple Truth behind Extraordinary Results, by Gary Keller and Jay Papasan

The Vision Driven Leader: 10 Questions to Focus Your Efforts, Energize Your Team, and Scale Your Business, by Michael Hyatt

A Light Shines Bright in Babylon, by Buck Jacobs

The Effective Executive: The Definitive Guide to Getting the Right Things Done, by Peter Drucker

The Four Obsessions of an Extraordinary Executive: A Leadership Fable, by Patrick Lencioni

Videos:

"The Power of Peers" – Tim Heyl (C12 YouTube)

"Peer Perspective: Paving a Path toward a Bright Future" – Ed Phy (C12 YouTube)

Previous C12 Segments:

"A Step-by-Step Process for Strategic Planning" – September 2023, Business and Ministry

"Preparing for Economic Uncertainty" – November 2022, Business

"Advancing the BaaM Vision" – October 2022, Ministry

"Executing Our Strategic Plans" – October 2022, Business

Monthly Thematic Resources

Readitfor.me Summaries (readitfor.me/C12):

These audio summaries are curated by Readitfor.me each month and are available to C12 members at no cost. Additionally, C12 members and their employees have free access to the entire Readitfor.me library. Please visit readitfor.me/C12 for more information. Summaries are also available in the C12 App.

Crazy Love: Overwhelmed by a Relentless God, by Francis Chan, with a foreword by Chris Tomlin and contributions from Danae Yankoski

God and Money: How We Discovered True Riches at Harvard Business School, by John Cortines and Gregory Baumer, with a foreword by Randy Alcorn

Essentialism: The Disciplined Pursuit of Less, by Greg McKeown

RightNow Media @ Work (app.rightnowmedia.org):

Relevant videos and materials are curated monthly and available on RightNow Media @ Work, including:

"Finish" – video series by Jon Acuff

"How to Be a Humble Leader" – video series by Julio Echevoyén

"The Five Questions of Vision Casting" – video series by Jeff Henderson