

# ACCOUNTABILITY CHART



**VISIONARY / CEO**

- Vision
- Culture
- Research & development
- Big relationships
- Solving big problems

# Quarterly Culture Survey

@Brandon - 20 hours

**INTEGRATOR / PRESIDENT**

- Leading, managing, accountability (LMA)
- Profit & Loss (P&L)
- Integrate all major functions
- Remove obstacles & barriers
- Core process

# Profit & Loss (P&L)

@Casey - 25 hours

**MARKETING & SALES**

- Leading, managing, accountability (LMA)
- Sales Goals
- Partnerships
- Closing
- Proposals

# Clients won

@Brandon - 20 hours

**OPERATIONS**

- Leading, managing, accountability (LMA)
- Contractor relationships & resourcing
- Continuous improvement
- 10x Playbook
- Billable time & allocation

# Effective rate

% Gross margin

@John - 32 hours

**ADMIN/FINANCE**

- Leading, managing, accountability (LMA)
- Budgeting approval
- Finance & admin decision making
- Attending finance meetings & own action items

% Planned Monthly Expenses to actuals

@Casey - 5 hours

**SALES OPERATIONS**

- Operations handoff
- Qualifying
- New contracts
- Sales scheduling
- Pipeline management & follow up

# Qualified meetings booked

@Shanna

**OPTIMAL GROWTH MARKETER**

- Client relationship
- Client retention
- Planning
- Delegation
- Execution

# Marketing Qualified Leads

\* Future - promote/hire

**LEAD GROWTH MARKETER**

- Coaching
- Facilitate process
- Strategy
- Industry trends

% Quarterly client retention of team

\* Future - promote/hire

**ONBOARDING SPECIALIST**

- Facilitate onboarding
- 90 day
  - Strategy
  - Project management
  - Retention
  - Execution
  - LMA

% Rolling 90 day client retention

@John - 24 hours

\* Future - promote/hire

**RESOURCE MANAGER**

- Find partners
- Partner onboarding
- Manage partner process
- Assist growth marketers
- Resource reporting

# TBD

@?

**BEAM ACCOUNT MANAGER**

- Client relationship
- Client retention
- Planning
- Delegation
- Execution

% Quarterly client retention

@Sami

**CFO**

- Forecasting
- Taxes
- Financial statements
- KPIs

# Financial statements in < 14 days

@Nicole

**HR**

- Payroll
- Benefits
- Policy & Compliance
- Hiring & firing
- Personal coaching/development

# Employee engagement survey

@Casey - 10 Hours

**OFFICE ADMIN**

- Supplies
- Events/Celebrations
- Office management

# No missed celebrations

@Olivia - 16 hours

**GROWTH MARKETER**

- Client relationship
- Client retention
- Planning
- Delegation
- Execution

% Quarterly client retention

@Ryan

@Chris

@Maggie

@Meghan

@Junn

**CONTROLLER**

- Account receivable (AR)
- Accounts payable (AP)
- Budget
- Bookkeeping
- Contract revisions

# Average AR <45 days

@Olivia - 24 hours