

# Welcome & Thank You to Our Sponsors

*Education Sponsor*



*Coffee Sponsor*



*Audio Visual Sponsor*



CHAUFFEUR  
**DRIVEN**



**NLA**<sup>®</sup>

**S H O W**

**MGM Grand**  
**LAS VEGAS**

MAR 1-3, 2026

*Education Sponsor*



*Audio Visual Sponsor*



# SCALING UP Easier with AI

Bill Gallagher  
ScalingCoach.com



*Education Sponsor*



*Audio Visual Sponsor*



Scaling Coach  
and podcast  
host.  
Entrepreneur  
Partner &  
Exec  
6 Companies  
\$550M+





Purpose WHY  
Values HOW  
Brand Promises WHAT  
BHAG WHERE  
Functional Leadership  
Vivid Vision  
Attribute Map  
Process Leadership  
Meeting Rhythm  
KPI's & Dashboards



# Intention & Agenda

1. Differentiated growth strategy
2. Build execution rhythms, sharpen people game, and see cash clearly *with AI as your partner*



#1  
10X IS EASIER

***What's your  
biggest,  
furthest out  
goal?***

***Is your  
goal  
financial?***

**B** ig  
**H** airy  
**A** udacious  
**G** oal

™ Jim Collins



5 MILLION BY 2020  
**1,118,513**  
GOOD TIMES & COUNTING



# Using AI....

- *What are the most common BHAG's or Big Hairy Audacious Goals of the chauffeured transportation industry?*
- *What are some BHAG's I should consider for my limo/chauffeured transportation company?*



WHAT'S  
YOUR MAIN  
CHALLENGE?

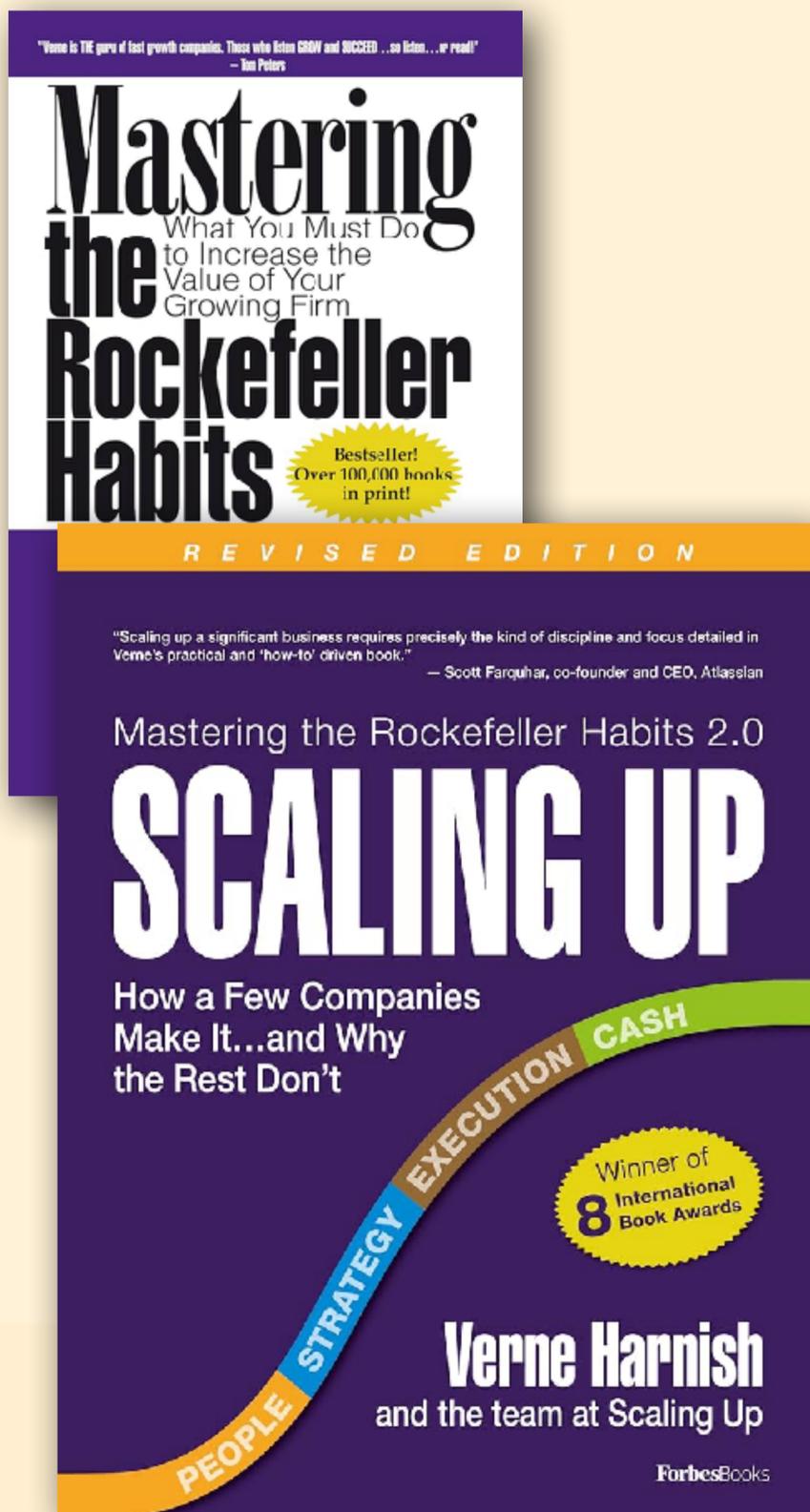
# Quick Assessment

1. **People & Teamwork**
2. **Strategy & Growth**
3. **Execution & Drama**
4. **Cash & Valuation**
5. **Leadership & Time**

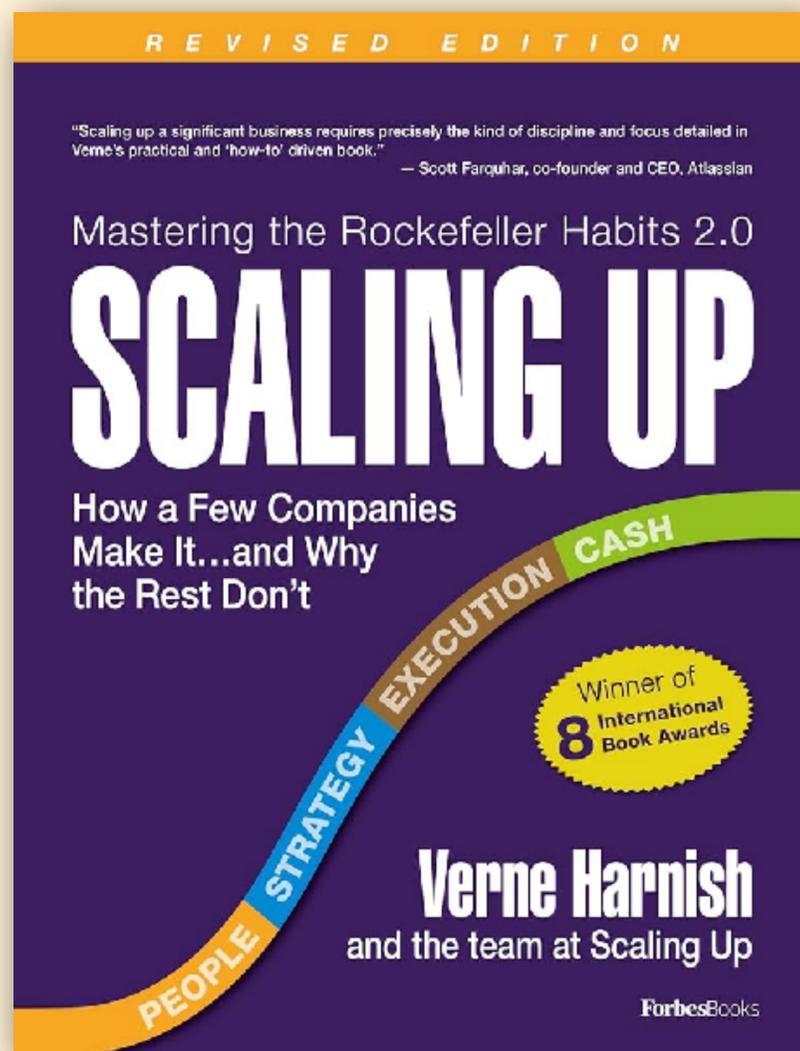
# Using AI....

- **What's my main challenge or barrier to growth as a chauffeured transportation company?**





MIT “Birthing of Giants”  
Rockefeller Habits, Harnish  
250+ Coaches Worldwide  
Over 70,000 leaders  
Exits of \$100M’s & \$1B+  
Open Best-Of Platform  
Evolving Tools  
***4 Decision areas...***



1. STRATEGY
2. PEOPLE
3. EXECUTION
4. CASH

# STRATEGY

Core Customer

Brand Promises

Differentiating Activities

Values

Culture

BHAG

Vivid Vision

# Strategy: Vision Summary



CORE VALUES	PURPOSE	BRAND PROMISES
<ul style="list-style-type: none"> <li>WE ACT IN OUR CLIENTS' BEST INTEREST</li> <li>WE THRIVE ON DETAIL.</li> <li>WE HAVE A BIAS FOR ACTION.</li> <li>WE RELY ON INITIATIVE.</li> <li>WE ENSURE THE BEST IDEA WINS.</li> </ul>	<h2>WE UNLEASH POTENTIAL</h2> <p><b>\$1B ROI FOR OUR CLIENTS</b></p>	<p><b>1. BEST IMPLEMENTATION:</b> FASTER, RIGHT THE FIRST TIME</p> <p><b>2. BEST PARTNERS:</b> SERVICE + SUPPORT</p> <p><b>3. FASTEST ROI</b></p>
STRATEGIC	PRIORITIES	
3-5 yr	1 yr	Qtr
4-6	3-5	3-5

Your Name: \_\_\_\_\_

### Your KPIs

### Goal

1		
2		
3		

#### Critical #: People or B/S

- 
- 
- Between green & red
- 

#### Critical #: Process or P/L

- 
- 
- Between green & red
- 

### Your Quarterly Priorities

### Due

1		
2		
3		
4		
5		

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.



# Strategy: Vision Summary



CORE VALUES	PURPOSE	BRAND PROMISES
<p>4-6 HOW WE WORK</p>	<p>WHY WHAT WE CARE ABOUT</p>	<p>3 THINGS THEY CAN COUNT ON</p>
STRATEGIC	10 YEAR IMPACT	PRIORITIES
3-5 yr	1 yr	Qtr



# AI for Values

- *Based on our website and what you know, what are my 4-5 Company Values?*
- *Share your website, driver handbook, customer reviews, and company stories — then ask for your 5 company values in 3-8 word phrases*

# AI for Purpose/Why

- *What do we seem to care most about for impact in the world?*
- *What is our purpose/why in the style of Simon Sinek Start with Why?*

# AI for Brand Promises

- **What are the top 3 brand promises in chauffeured transportation? How do they compare to Uber Black and Blacklane?**
- **How are we different and what should our 3 brand promises be?**

# Using AI....

## **1. Strengths & Weaknesses**

*“How does my limo company compare to Uber Black, Blacklane, and my top local competitor? What are my top strengths and weaknesses?”*

## **2. Trends & Strategy**

*“What are the top trends now affecting chauffeured transportation — EVs, insurance costs, AI dispatching, corporate travel changes — and how should I deal with them?”*

## **3. Constraints**

*“What are the top 5 constraints for companies in the chauffeured transportation industry?”*

## **4. Novel Solutions**

*“What are 5 novel ways to address #\_\_ and #\_\_?”*

## **5. Ideal Customer Profile**

*“My best customers are corporate travel managers and executive assistants at mid-size firms. Please create an ideal customer profile with their main pain points and buying triggers.”*

## **6. Reaching Prospects**

*“What are some places and ways to reach these prospects?”*

# Vivid Vision

## 3-5 Years



1-800-GOT-FUNNY

Call Year Round

THE WORLD'S LARGEST

1-800-GOT-FUNNY

CLOSE

4-6  
HOW WE WORK

**WHY**  
WHAT WE CARE ABOUT

3 THINGS THEY CAN COUNT  
ON

**BHAG**  
10 YEAR IMPACT

**STRATEGIC**

**PRIORITIES**

3-5 yr

1 yr

Qtr

5-10

3-5

3-5

Your Name: \_\_\_\_\_

Your KPIs

Goal

Your Quarterly Priorities

Due

1		
2		
3		

**Critical #: People or B/S**

- 
- 
- Between green & red*
- 

**Critical #: Process or P/L**

- 
- 

1		
2		
3		
4		



# AI for Vivid Vision

- *Do a deep visioning exercise and write or dictate transcribe all your thoughts and ideas*
- *Have AI tidy it all up in the style of a Vivid Vision from Jim Collins and Cameron Harold's work*
- *Create a single page version with artwork*

# EXECUTION

Vision Summary  
Quarterly Planning  
Cascading Priorities  
Daily Huddles  
4D Weekly Meeting  
Manifesto  
4Q Conversations

## Execution: Rockefeller Habits Checklist™

**SCALING UP**  
A GAZELLES COMPANY

### 1. The executive team is healthy and aligned.

- Team members understand each other's differences, priorities, and styles.
- The team meets frequently (weekly is best) for strategic thinking.
- The team participates in ongoing executive education (monthly recommended).
- The team is able to engage in constructive debates and all members feel comfortable participating.

### 2. Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move the company forward.

- The Critical Number is identified to move the company ahead this quarter.
- 3-5 Priorities (Rocks) that support the Critical Number are identified and ranked for the quarter.
- A Quarterly Theme and Celebration/Reward are announced to all employees that bring the Critical Number to life.
- Quarterly Theme/Critical Number posted throughout the company and employees are aware of the progress each week.

### 3. Communication rhythm is established and information moves through organization accurately and quickly.

- All employees are in a daily huddle that lasts less than 15 minutes.
- All teams have a weekly meeting.
- The executive and middle managers meet for a day of learning, resolving big issues, and DNA transfer each month.
- Quarterly and annually, the executive and middle managers meet offsite to work on the 4 Decisions.

### 4. Every facet of the organization has a person assigned with accountability for ensuring goals are met.

- The Function Accountability Chart (FACe) is completed (right people, doing the right things, right).
- Financial statements have a person assigned to each line item.
- Each of the 4-9 processes on the Process Accountability Chart (PACe) has someone that is accountable for them.
- Each 3-5 year Key Thrust/Capability has a corresponding expert on the Advisory Board if internal expertise doesn't exist.

### 5. Ongoing employee input is collected to identify obstacles and opportunities.

- All executives (and middle managers) have a Start/Stop/Keep conversation with at least one employee weekly.
- The insights from employee conversations are shared at the weekly executive team meeting.
- Employee input about obstacles and opportunities is being collected weekly.
- A mid-management team is responsible for the process of closing the loop on all obstacles and opportunities.

### 6. Reporting and analysis of customer feedback data is as frequent and accurate as financial data.

- All executives (and middle managers) have a 4Q conversation with at least one end user weekly.
- The insights from customer conversations are shared at the weekly executive team meeting.
- All employees are involved in collecting customer data.
- A mid-management team is responsible for the process of closing the loop on all customer feedback.

### 7. Core Values and Purpose are "alive" in the organization.

- Core Values are discovered, Purpose is articulated, and both are known by all employees.
- All executives and middle managers refer back to the Core Values and Purpose when giving praise or reprimands.
- HR processes and activities align with the Core Values and Purpose (hiring, orientation, appraisal, recognition, etc.).
- Actions are identified and implemented each quarter to strengthen the Core Values and Purpose in the organization.

### 8. Employees can articulate the following key components of the company's strategy accurately.

- Big Hairy Audacious Goal (BHAG) – Progress is tracked and visible.
- Core Customer(s) – Their profile in 25 words or less.
- 3 Brand Promises – And the corresponding Brand Promise KPIs reported on weekly.
- Elevator Pitch – A compelling response to the question "What does your company do?"

### 9. All employees can answer quantitatively whether they had a good day or week (Column 7 of the One-Page Strategic Plan).

- 1 or 2 Key Performance Indicators (KPIs) are reported on weekly for each role/person.
- Each employee has 1 Critical Number that aligns with the company's Critical Number for the quarter (clear line of sight).
- Each individual/team has 3-5 Quarterly Priorities/Rocks that align with those of the company.
- All executives and middle managers have a coach (or peer coach) holding them accountable to behavior changes.

### 10. The company's plans and performance are visible to everyone.

- A "situation room" is established for weekly meetings (physical or virtual).
- Core Values, Purpose and Priorities are posted throughout the company.
- Scoreboards are up everywhere displaying current progress on KPIs and Critical Numbers.
- There is a system in place for tracking and managing the cascading Priorities and KPIs.

To get help implementing these tools, please go to [www.ScalingUp.com](http://www.ScalingUp.com)

v20/02 - © 2020 by Scaling Up Coaches | E2



# The Rockefeller Habits™

1. The executive team is healthy and **aligned**.
2. Everyone is aligned with the **#1 thing** for the quarter.
3. Communication & **meeting rhythms** move information accurately.
4. Every facet of the company has a person assigned with **accountability**.
5. Ongoing **employee input** is collected.
6. Reporting & analysis of **customer feedback** data is frequent & accurate.
7. Core **Values and Purpose** are “**alive**” in the organization.
8. Employees can articulate the **company’s strategy** accurately.
9. Employees can say quantitatively (**KPIs**) whether they had good day/week.
10. Plans & performance are visible to everyone. (**Dashboard/Situation Room**)

# Using AI....

- **We're a chauffeured transportation company with drivers, dispatchers, and a small office team. Which one of the Rockefeller Habits should we focus on for the next 90 days? We can only focus on one habit.**

Strategy: Vision Summary



CORE VALUES	PURPOSE	BRAND PROMISES
<ul style="list-style-type: none"> <li>WE ACT IN OUR CLIENTS' BEST INTEREST</li> <li>WE THRIVE ON DETAIL.</li> <li>WE HAVE A BIAS FOR ACTION.</li> <li>WE RELY ON INITIATIVE.</li> <li>WE ENSURE THE BEST IDEA WINS.</li> </ul>	<p><b>WE UNLEASH POTENTIAL</b></p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <p><b>BHAG</b> \$1B ROI FOR OUR CLIENTS</p> </div>	<ol style="list-style-type: none"> <li><b>BEST IMPLEMENTATION:</b> FASTER, RIGHT THE FIRST TIME</li> <li><b>BEST PARTNERS:</b> SERVICE + SUPPORT</li> <li><b>FASTEST ROI</b></li> </ol>
STRATEGIC	PRIORITIES	PRIORITIES
3-5 yr	1 yr	Qtr
4-6	3-5	3-5
Your Name: _____		
Your KPIs	Goal	Your Quarterly Priorities
1		1
2		2
3		3
		4
		5
<p><b>Critical #: People or B/S</b></p> <p> <span style="color: green;">■</span> <span style="color: yellow;">■</span> <span style="color: red;">■</span>                      Between green &amp; red                 </p> <p><b>Critical #: Process or P/L</b></p> <p> <span style="color: green;">■</span> <span style="color: yellow;">■</span> <span style="color: red;">■</span>                      Between green &amp; red                 </p>		

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.



# "The Meeting Rhythm"



# Which meetings need work?

# Using AI....

- *Have AI summarize your driver meetings, dispatch huddles, and team calls from Zoom, Teams, or a transcription*
- *Have AI create and assign the action items for follow-up*
- *Ask AI what to follow-up on from your last meeting*

# PEOPLE

Topgrading

Job Scorecards

Talent Development

Peer Coaching

Retention

Lean practices

Funding models

Buy/Build

THE PROVEN HIRING AND PROMOTING METHOD THAT TURBOCHARGES COMPANY PERFORMANCE

FULLY REVISED AND UPDATED

# Topgrading

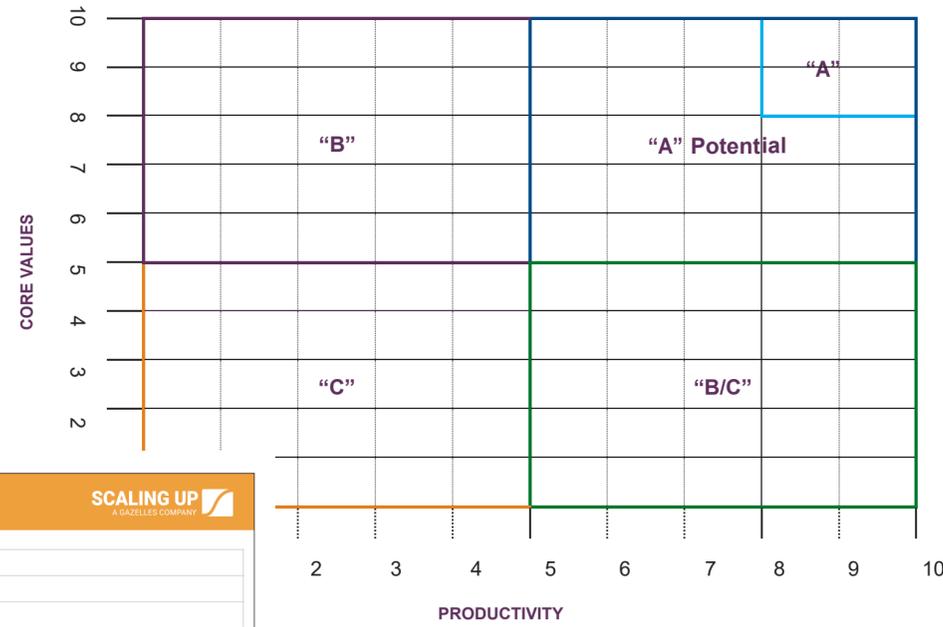
3RD EDITION

BRADFORD D. SMART, Ph.D.



## People+: Talent Assessment Chart

SCALING UP  
A GAZELLES COMPANY



### Job Scorecard

SCALING UP  
A GAZELLES COMPANY

Name & Date					
Position, reports to					
Purpose of the job					
Desired Results	KPI	SG (A+)	Green	Yellow	Red
Key Responsibilities	Rating	Comments			
Skills, Traits & Competencies	Rating	Comments			
Living Core Values	Rating	Comments			

Note: Rate on a scale of 1-10 or Green, Yellow, Red

To download more copies or to get help implementing these tools, please go to [www.ScalingUp.com](http://www.ScalingUp.com)

vBG20101 - Copyright 2020 Gazelles 7



**People: Function Accountability Chart (FACe)**



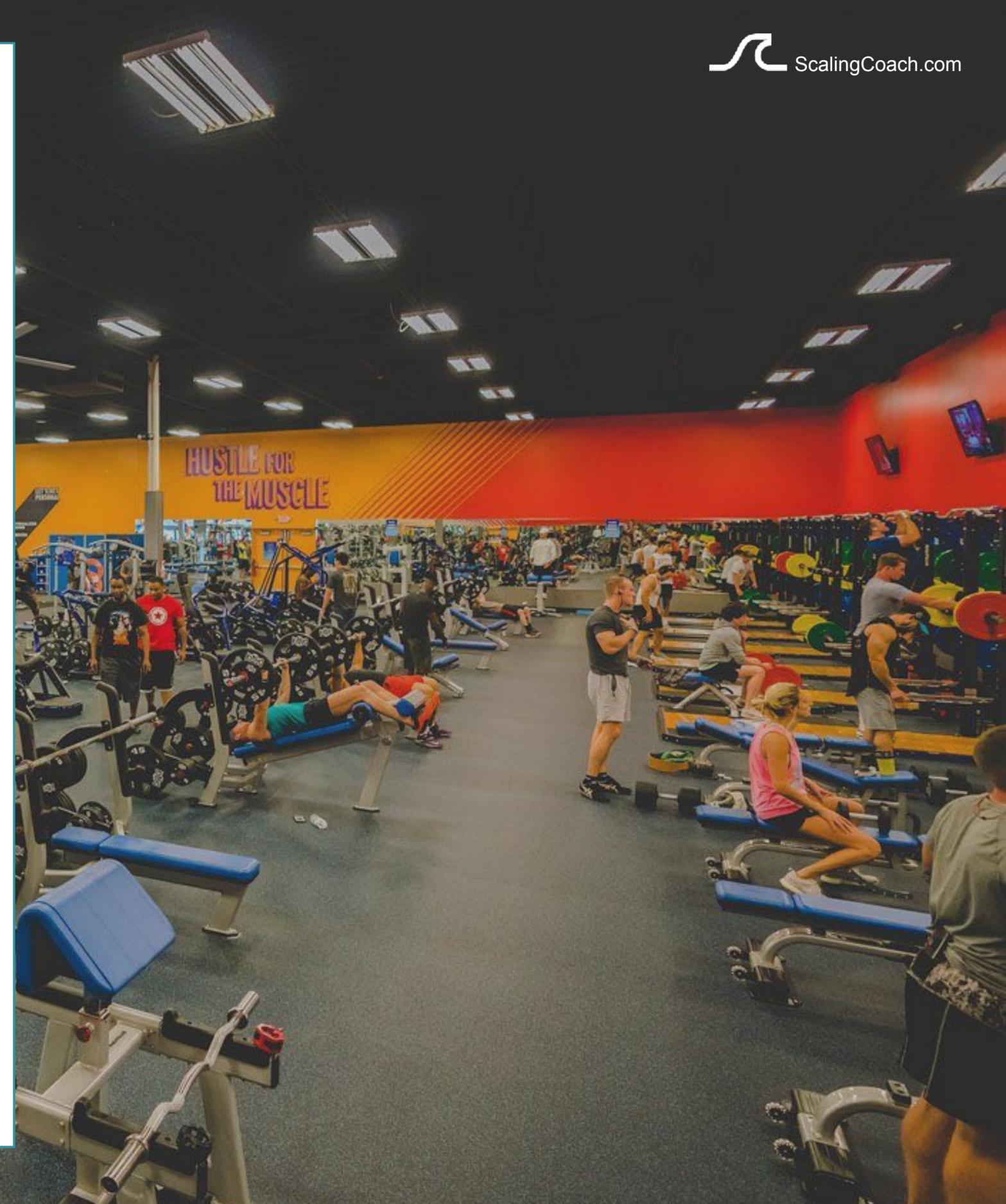
- 1 Name the person accountable for each function
- 2 Ask the four questions at the bottom of the page re: whose name(s) you listed for each function
- 3 List Key Performance Indicators (KPIs) for each function
- 4 Take your Profit and Loss (P/L), Balance Sheet (B/S), and Cash Flow accounting statements and assign a person to each line item, then derive appropriate Results/Outcomes for each function

Functions	1 Person Accountable	3 Leading Indicators (Key Performance Indicators)	4 Results/Outcomes (P/L or B/S Items)
Head of Company			
Marketing			
R&D/Innovation			
Sales			
Operations			
Treasury			
Controller			
Information Technology			
Human Resources			
Talent Development/Learning			
Customer Advocacy			
Heads of Business Units			
• _____			
• _____			
• _____			
• _____			

2 Identify: 1. More than 1 Person in a Seat; 2. Person in more than 1 seat; 3. Empty seats; 4. Enthusiastically Rehire?



Functions	1 Person Accountable
Head of Company	
Marketing	
R&D/Innovation	
Sales	
Operations	
Treasury	
Controller	
Information Technology	
Human Resources	
Talent Development/Learning	
Customer Advocacy	



# AI for FACe

- **Which role are we most lacking: dispatch manager, fleet ops, sales, or driver development?**
- **Which role is most muddled for us?**
- **What am I doing too much of?**

# Using AI....

- *AI can summarize driver feedback surveys and suggest retention action plans*
- *Write chauffeur job postings, screen driver applications, and create onboarding checklists*
- *AI can generate interview questions for chauffeurs, dispatchers, and operations roles*

# CASH

Cash Flow Story

Power of 1

Cash Conversion Cycle

Pricing Strategy

### Cash: The Power of One



**Your Power of One** **Net Cash Flow \$** **EBIT \$**

Your Current Position

**Your Power of One** **Change You Would Like to Make** **Annual Impact on Cash Flow \$** **Impact on EBIT \$**

Price Increase %  %

Volume Increase %

COGS Reduction %

Overheads Reduction %

Reduction in Debtors Days

Reduction in Stock Days

Increase in Creditors Days

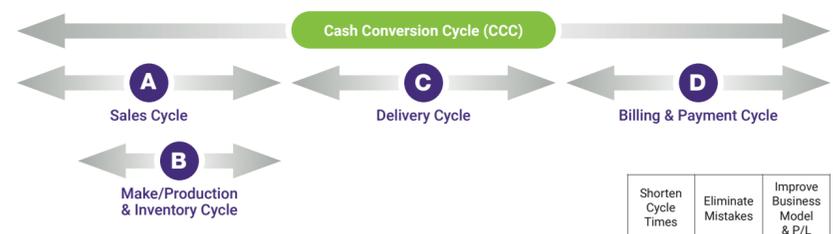
**Your Power of One Impact**

**Your Power of One**

Your **Adjusted** Position

To get help implementing these tools, please go to [ScalingCoach.com](https://ScalingCoach.com)

### Cash: Cash Acceleration Strategies (CASH)



**A** Ways to improve your Sales Cycle

1			
2			
3			
4			
5			

**B** Ways to improve your Make/Production & Inventory Cycle

1			
2			
3			
4			
5			

**C** Ways to improve your Delivery Cycle

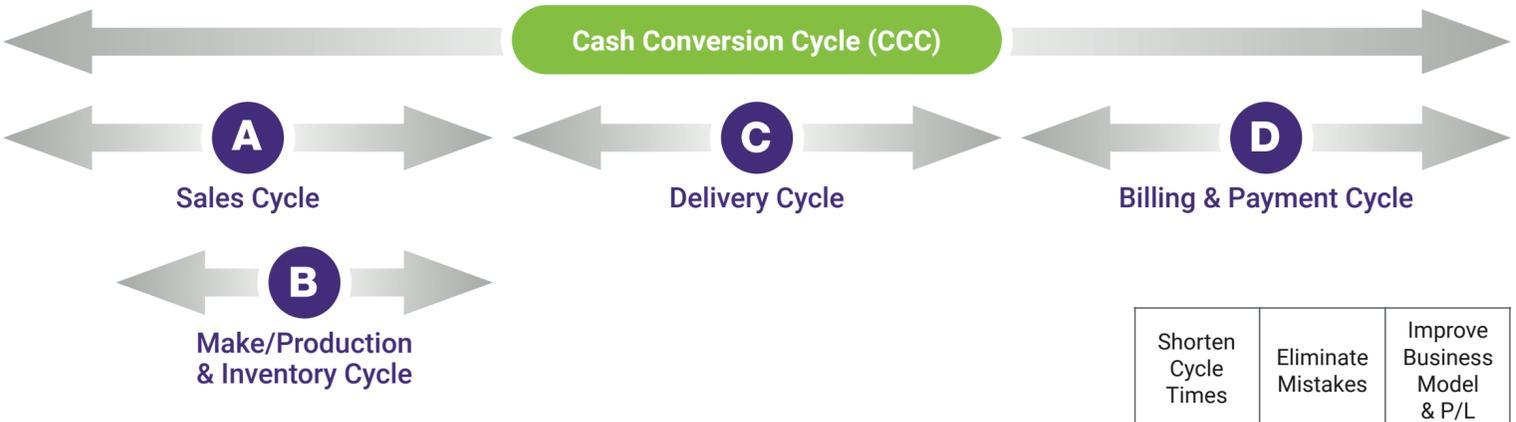
1			
2			
3			
4			
5			

**D** Ways to improve your Billing & Payment Cycle

1			
2			
3			
4			
5			

64 To get help implementing these tools, please go to [ScalingCoach.com](https://ScalingCoach.com)

v20/02 - © 2020 by Scaling Up Coaches



**A** Ways to improve your Sales Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**B** Ways to improve your Make/Production & Inventory Cycle

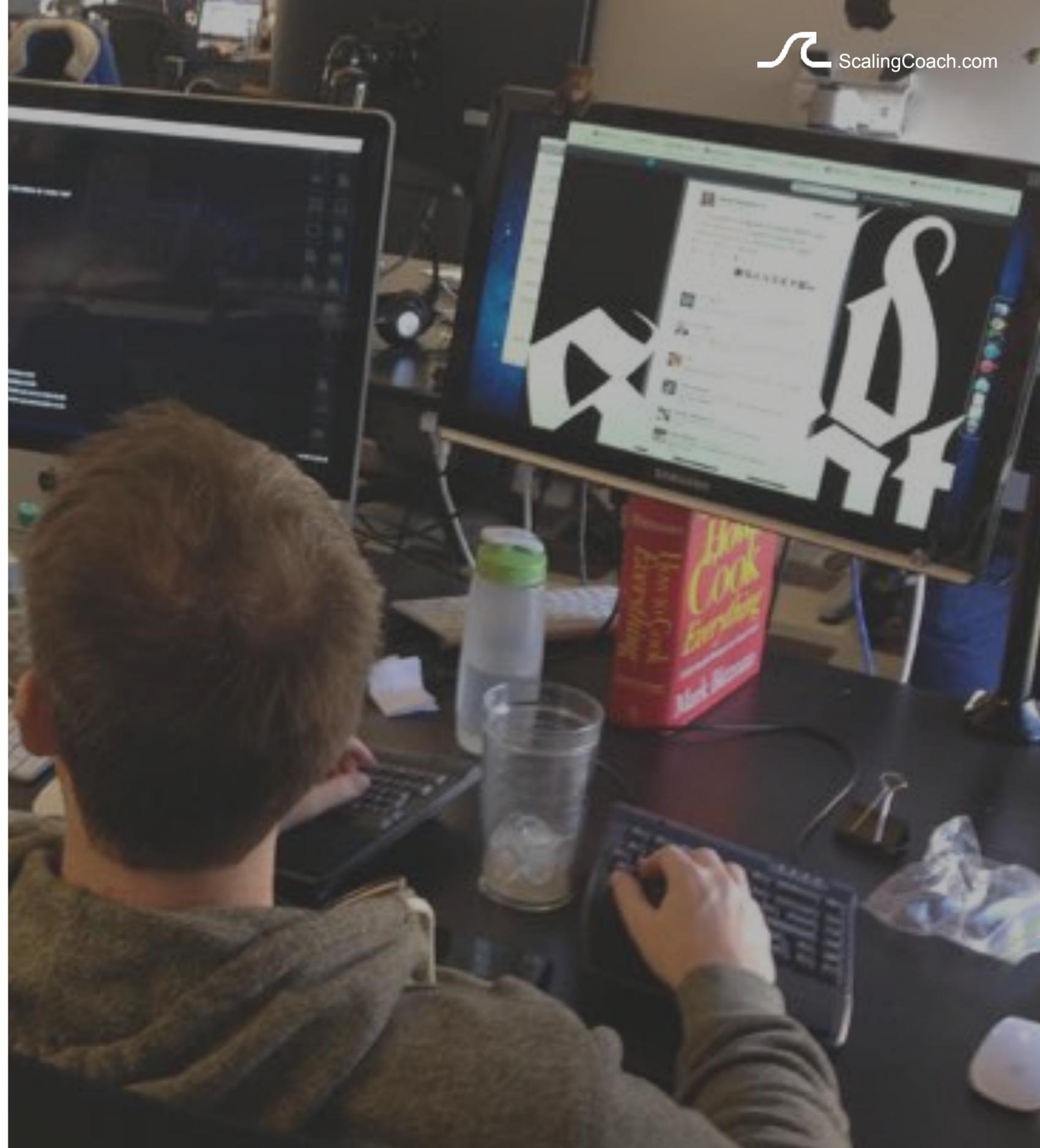
	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**C** Ways to improve your Delivery Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			

**D** Ways to improve your Billing & Payment Cycle

	Shorten Cycle Times	Eliminate Mistakes	Improve Business Model & P/L
1			
2			
3			
4			
5			



# Using AI....

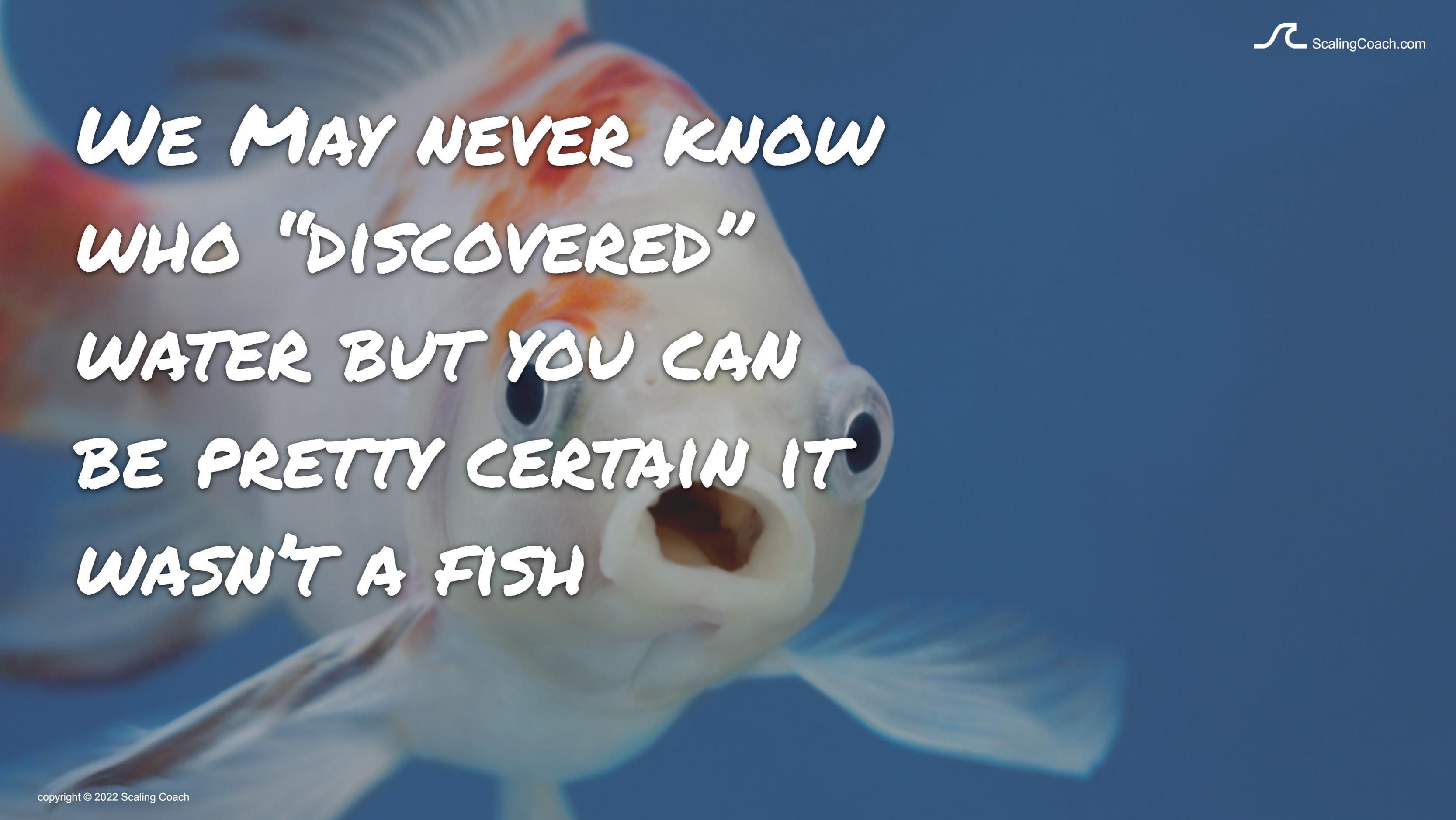
- *Upload YTD and last year P&L and Balance Sheet to your PAID AI*
- *Ask for Power of One analysis in the style of Alan Miltz Cash Flow Story*
- *Ask for top 3 recommendations to improve cash and profit.*

# Using AI....

- *AI can analyze your financial reports and give you ideas for improvements*
- *AI can give you industry norms and tell you where you are better or worse*



# How coaching and peer learning works....

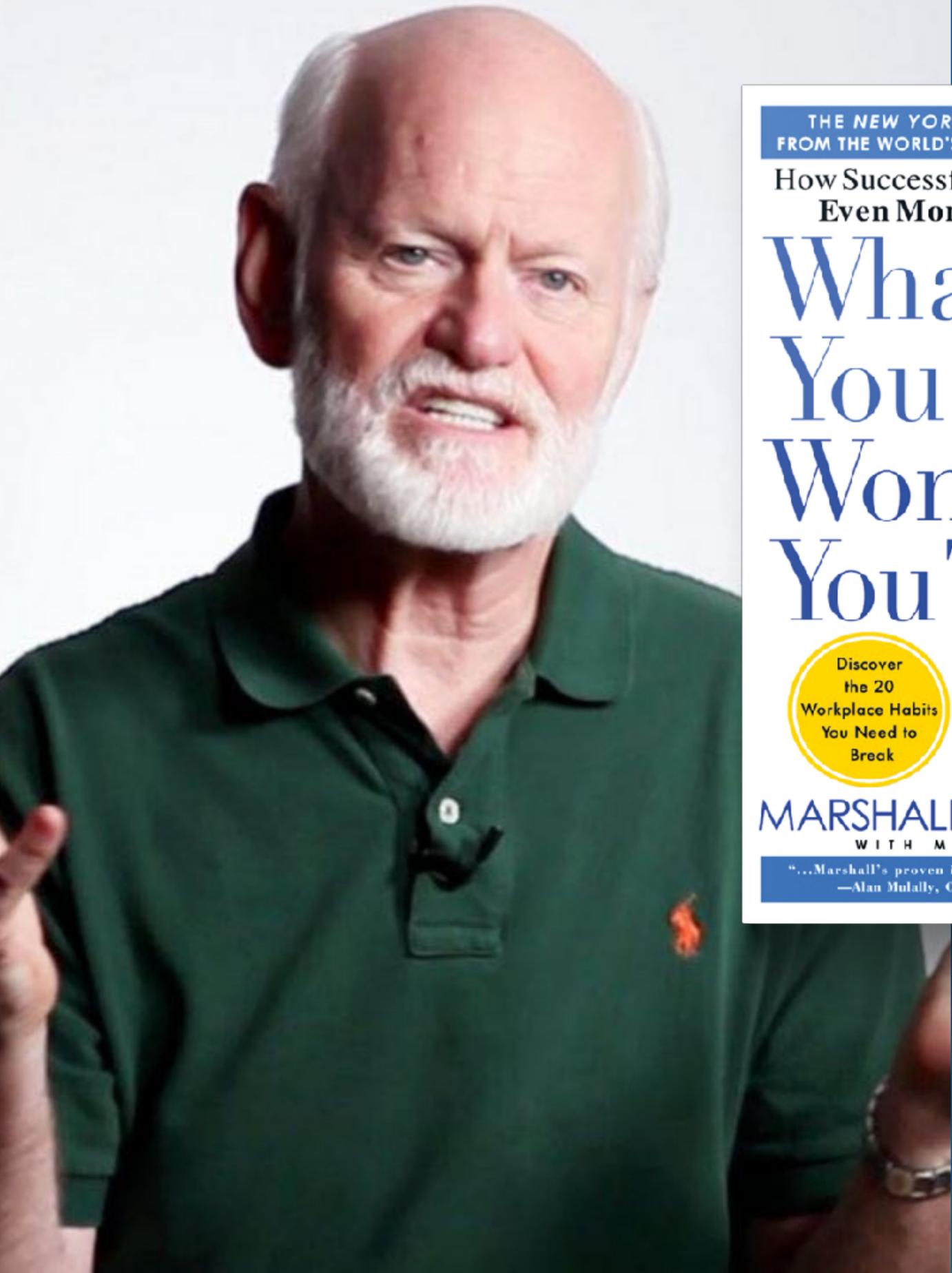


WE MAY NEVER KNOW  
WHO "DISCOVERED"  
WATER BUT YOU CAN  
BE PRETTY CERTAIN IT  
WASN'T A FISH

**Coach & peers  
can help you see  
things you  
weren't even  
looking for**

A photograph of Mike Tyson in a boxing ring, shirtless and wearing red boxing gloves and black shorts with a USA patch. He is in a fighting stance, looking down at an opponent who is lying on the canvas in the foreground. The background shows the ropes of the ring and a dark arena with some lights.

Everyone has a  
plan until they  
get punched in  
the face. -Mike Tyson



THE NEW YORK TIMES BESTSELLER  
FROM THE WORLD'S #1 LEADERSHIP THINKER

How Successful People Become  
Even More Successful!

# What Got You Here Won't Get You There

Discover  
the 20  
Workplace Habits  
You Need to  
Break

MARSHALL GOLDSMITH  
WITH MARK REITER

"...Marshall's proven improvement process ROCKS!"  
—Alan Mulally, CEO, Ford Motor Company



# Which Tools Now?

Functional Accountability  
Talent Assessment  
Job Scorecards  
Top-grading  
Team Health

Core Customer  
Brand Promises  
Core Values  
Purpose/Why  
BHAG™ & Vision

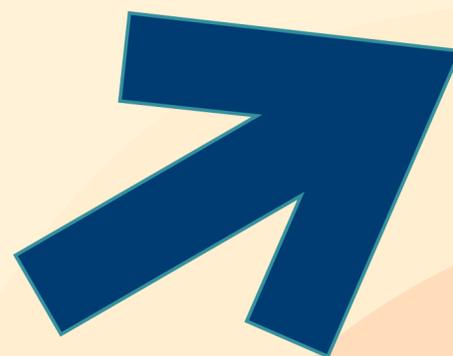
Quarterly Priorities  
KPI's  
Dashboards  
Meeting Rhythms  
Process Work & Lean

Cash Conversion Cycle  
Power of 1  
Valuation Improvement  
Pricing Strategy

# Mindset → Results



ACTION



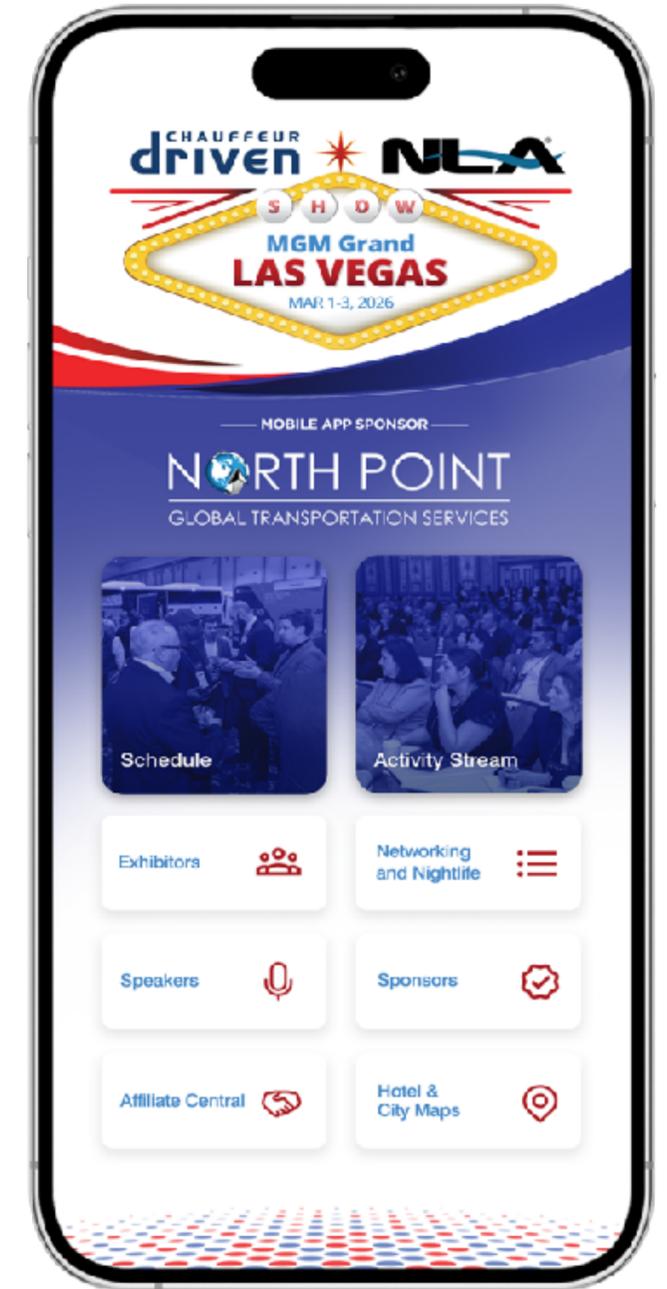
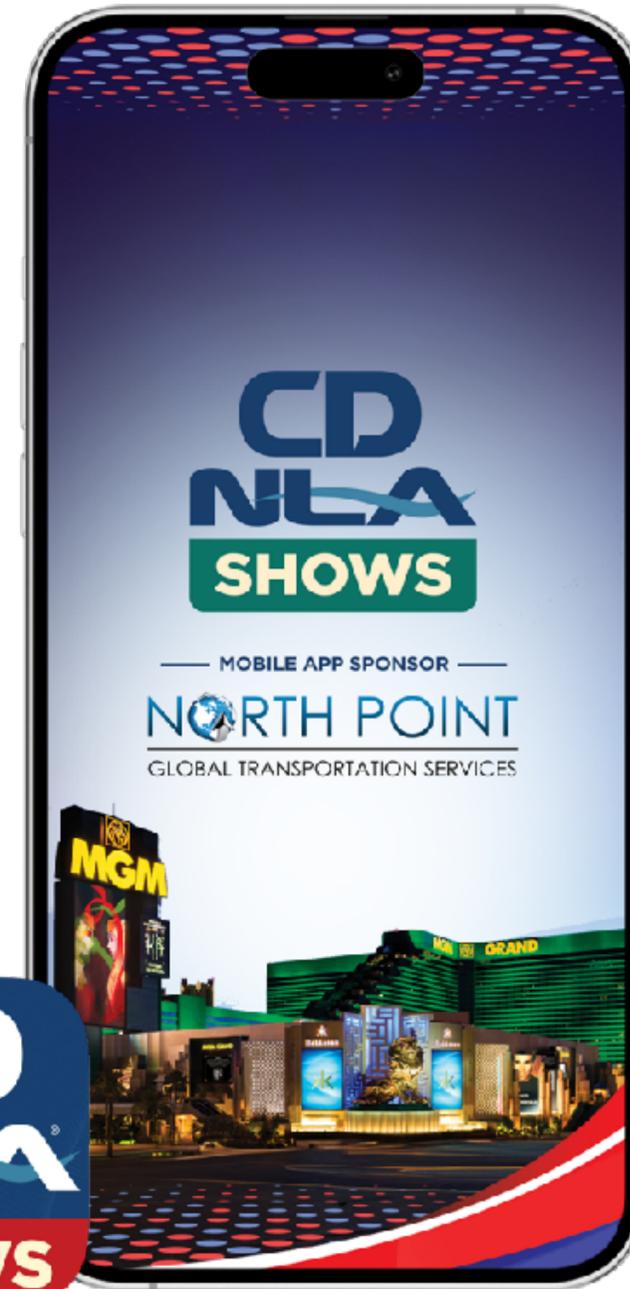
# Take the Growth Assessment



[ScalingCoach.com/q20](https://ScalingCoach.com/q20)

# Let Us Know How We Did!

Please complete the survey you received to share your feedback!



CHAUFFEUR  
**DRIVEN**



**NLA**<sup>®</sup>

**S H O W**

**MGM Grand**  
**LAS VEGAS**

MAR 1-3, 2026

***Thank You for Joining Us!***

*Education Sponsor*



*Coffee Sponsor*



*Audio Visual Sponsor*

