

# Integrator



**Seat Owner:** Scott Levy

**Reports To:** Visionary

## Reporting Seats

These are the seats that are direct reports up to the current seat

- **VP Product Sales** - David Box
- **VP Operations** - Jeff Bell
- **CFO** - Ileenester
- **EVP Business Development (Inbound Sales)** - Robert Erwin
- **CIO** - Brian Childers

## ACCOUNTABILITIES

1. LMA
2. Build and Manage Operational Cadence and Business Operating System
3. Annual goals / planning and Execution Playbook
4. Performance Management Standards
5. Process/Playbook Standards

## MEASURABLES

- None listed

## PROCESS / PLAYBOOK INVENTORY

- Performance Review V20251218
- GPT Process Checklist Builder

## ROCKS | Q4 2025

- 100% of assets are handled profitably [active]
- Lock in a Refreshed Accountability Chart to Drive Process Improvement and Remove Bottlenecks [active]

# Self Assessment Toolkit For Scott Levy

Scorecard For GWC

<b>GETS IT</b> Strongly agree=5   Strongly disagree=1	<b>Rate 1-5</b>
I understand the needs of this seat, its component roles, and how they relate to the business	
I understand the technical skills required and how they relate to my ability to get the job done.	
I understand the technical skills required and how they relate to the vision and mission of our business.	
<b>TOTAL FOR GETS IT _____ OF 15 POSSIBLE</b>	

<b>WANTS IT</b> Strongly agree=5   Strongly disagree=1	<b>Rate 1-5</b>
Problem solving in these roles engages my mind and curiosity.	
This role aligns with my career and financial goals	
This is the role I most want to be in right now	
<b>TOTAL FOR WANTS IT _____ OF 15 POSSIBLE</b>	

COMPANY Strongly agree=5   Strongly disagree=1	Rate 1-5
I am clear on the company's vision	
I understand the company's goals for the year	
I understand the company's 90 day action plan (rocks and milestones) as they relate to my work	
I understand the company's core values, I use them in my decision making and I see the company using them in its decision making.	
The company's weekly meeting rhythm helps me stay on track	
The communications from my direct superior is clear and helpful	
I receive the resources (tools, budget) I need to excel in my role	
I receive the training and support I need to excel in my role	
I understand when/how to use our different communication tools, and the way my teammates use them helps me stay focused and organized	
I understand how and where our company stores its knowledge	
TOTAL FOR EMPOWERED EXECUTION _____ OF 50 POSSIBLE	

## What went well in the last 90 days.

Put an asterisk on anything that you want to make a habit or ensure you do as a process. Circle anything that deserves celebration as a win (the more the better, be liberal).

## What did not go as well as you would have liked in the last 90 days.

Circle anything you want to escalate to an issue for discussion

# START/STOP/KEEP

## **STOPS: What will you stop doing in the coming 90 days**

What things would improve your focus and results if you completely got rid of them.

## **KEEPS: What new learnings or approaches did you try that you want to keep and/or b**

## **START: Based on your issues, learnings and the business situation, what will you co**

