

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

GETS IT	Rate 1-5
Strongly agree=5 Strongly disagree=1	
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.	
TOTAL FOR GETS IT _____ OF 15 POSSIBLE	

WANTS IT	Rate 1-5
Strongly agree=5 Strongly disagree=1	
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	
TOTAL FOR WANTS IT _____ OF 15 POSSIBLE	

COMPANY	Rate 1-5
Strongly agree=5 Strongly disagree=1	
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 build upon?

START: Based on your issues, learnings and the business situation, what will you commit to starting?

