



Helmwise Glossary of Acronyms and Terms (GoAT)

Activational Infinity Loop	The methodology that aids a Helmwise Captain in successfully navigating to their next Waypoint. It provides the Lens to Act. The Activational Infinity Loop guides the Helmwise Captain to consider the Navigation Aids at their disposal and their ship's (business) condition using the ShipWorks framework during each step of the OAR process.
AIL	The abbreviation for the Activational Infinity Loop.
Align	The second step of the OAR process. The acceptance of the current seascape (business environment), defining the future state envisioned by asking the right question, and rallying others to enlist and commit to the journey.
ARQ ("Arc")	The abbreviation for "asking the right question."
BHAG	An acronym for Big Hairy Audacious Goal. The BHAG term was popularized by author Jim Collins in his book <i>Built to Last</i> and is defined as a goal that is so clear and compelling, that it needs little explanation; people get it right away. Think of the NASA moon mission of the 1960s. The best BHAGs require both building for the long term AND exuding a relentless sense of urgency.
Captain	The Helmwise metaphor for the owner, CEO, President, or leader of an enterprise.
CIL	The abbreviation for the Conceptual Infinity Loop.
Conceptual Infinity Loop	The methodology that aids a Helmwise Captain in successfully seeing the right question to ask, at the right time, and at the right depth. It provides the Lens to See. The Conceptual Infinity Loop guides a Helmwise Captain to consider the State of the Captain and the State of the Sea when discovering the right question for the current circumstances.
Core Discipline	The discipline of asking the right question, at the right time, and at the right depth. The Conceptual Infinity Loop facilitates adherence to the core discipline.
Core Four	The four essential values or characteristics of a Helmwise Captain – Humility, Stewardship, Sacrifice, and Legacy.
Crew	The Helmwise metaphor for business or enterprise employees. The collective members of a Captain's organization.
Destination	A 1-year, 3-year, 5-year goal or BHAG that can be broken down into Waypoints.
Direction	A Captain's reasoned, clear, and contextualize instructions to their Crew.
GHO	The abbreviation for Gratitude, Hope, and Optimism.
Golden Rope	The combination of five Helmwise evangelized virtues – Gratitude, Love, Faith, Hope, and Optimism. Collectively, they



	form a figurative rope to grab hold of to steady a Captain or Crew member in choppy seas (difficult or uncertain times).
Grit	The passion and sustained persistence applied toward long-term achievement, with no particular concern for rewards or recognition along the way. A term popularized in <i>Grit</i> by Angela Duckworth.
Helmwise Captain	A business leader who has attended a Helmwise Cohort and adopted the Helmwise Infinity Loop methodology of asking the right question, at the right time, and at the right depth.
Helmwise Community	The group term for those who have attended a Helmwise Cohort and have chosen to participate in a collegiate, collaborative, supportive, and mutually beneficial discussions to enrich one another and foster business success based on Helmwise principles.
Helmwise Chart Room	A secure online learning management system where Cohort alums access digital copies of Cohort content along with ongoing curated podcasts, webinar recordings, and other resources to augment post-Cohort learning and foster a professional Community of Helmwise Captains.
Helmwise Fellow	A hand-selected, business-seasoned member of the Helmwise Community who has agreed to remain knowledgeable of the Helmwise Cohort content, assist with the Cohort experience, maintain awareness of Helmwise service offerings, evangelize the Helmwise mission, and contribute to the Cohort community.
Infinity Loop	The perpetual process that a Helmwise Captain follows to guide and lead their ship (business). The Infinity Loops ensure a Helmwise Captain grounds themselves, considers key variables, eliminates distracting courses of action to discover a high-probability solution, and acts on it.
Keel	The Helmwise metaphor for the core values of a business or enterprise (Ship).
Lens to Act	The outcome or purpose of the Activational Infinity Loop.
Lens to See	The outcome or purpose of the Conceptual Infinity Loop.
OAR ("Oar")	An acronym for Orient, Align, and Reckoning. OAR is the process that drives the Activational Infinity Loop.
Orient	The first step in the OAR process. It is the process of understanding the Captain's and the business's present strengths and limitations and their impact on answering and executing the Core Discipline.
Pattern	A fundamental sequence of events that occur in nature, human neurochemistry, psychology, or are so ingrained in business that any expending effort to alter them is foolhardy.
PDE	1. The abbreviation for Perception, Data, and Execution, which are the three elements of team alignment and client



	<p>engagement. Internal alignment follows a sequence of Perception (explanation of the Why), followed by Data (the measures to prove progress toward the Why), and finally by Execution (definition of the actions to deliver the Why). Client engagement and team execution follow the sequence of Perception, then Execution, then Data.</p> <p>2. The Abbreviation for Purpose-Driven Engagement, the collective name for the application of the Perception-Data-Execution process.</p>
PDE Flywheel	The momentum gained and sustained through the consistent application of the PDE Framework.
PDE Framework	The Perception-Data-Execution model that aligns and empowers teams and client relationships.
Pieces of Eight	The eight critical questions whose answers validate that a Helmwise Captain has considered the essential variables and can act with a high probability of success.
Principle	A primary and permanent tenant of business, leadership, or human nature.
Question	The well-formed byproduct of executing the Core Discipline. The final singular question distilled from asking the right question, at the right time, and at the right depth.
Reckoning	The third step of the OAR process. The calculating and communicating the capabilities of the Captain, Ship, and Crew (entire business), monitoring progress, and taking proactive steps to remain on course or adjust course to realize that value.
Seasonality	A characteristic of a time series in which a business, an individual, or an industry experiences regular and predictable changes that recur every calendar year or experiences a predictable fluctuation or pattern that recurs or repeats over time.
Ship	The Helmwise metaphor for a business or enterprise.
ShipWorks	The five crucial elements that all Ships (businesses) must have in place before embarking towards their next Waypoint - Culture, People, Disciplines, Measures, and Communications.
SMART	An acronym used to clearly define a goal or objective. A clearly defined goal or objective is Specific, Measurable, Achievable, Relevant, and Time-bound.
State of the Captain	The left side of the Conceptual Infinity Loop used by a Helmwise Captain as a reminder of, or rededication to, the Core Four values or characteristics of a Helmwise Captain (Humility, Stewardship, Sacrifice, and Legacy)
State of the Sea	The right side of the Conceptual Infinity Loop used by a Helmwise Captain to recognize and leverage transcendent principles and patterns, reinforce the importance of a



	methodology, and the use of dashboards and triggers as early warnings of changing business conditions.
State of the Ship	The examination of a business's (Ship's) culture, people, disciplines, measures, and communications components (collectively known as ShipWorks) by a Captain and the resulting assessment of their fitness for the next stage of the business journey. The State of the Ship is an element that is examined during the Pieces of Eight questioning process.
Strand	One of the elements of the Golden Rope. Either Gratitude, Love, Faith, Hope, or Optimism.
Three-Legged Stool	A reference to the three components of Hope – Gratitude, Love, and Faith.
Transcendent	Universal and omnipresent. A principle or pattern considered unalterable.
Trigger	A tracked metric or measure that, once reached, prompts decisive action and communication to avoid crisis. A trigger kicks off the Helmwise Infinity Loop methodology.
Waypoint	A goal or micro-goal that moves the organization closer to its destination. It could be a 30-day, 90-day (quarter), 1-year, or in some cases a 3-year goal.
Waypoint Assessment	A Helmwise service that performs a comprehensive evaluation and analysis of all aspects of a Ship (business) to validate the seaworthiness of its strategy, operations, and people components.
Whitecap	A fundamental pattern of business evolution and revolution.
Rosewood	Shortform for the Rosewood Family of Companies, the parent holding company of Helmwise.
Sense-making	The action or process of making sense of or giving meaning to something, especially new developments and experiences.
At Table	The gathering of Captains to discuss issues and concepts, conduct collegial debate, and to ask questions to gain insight and knowledge. The event is usually facilitated by a Helmwise faculty member or a Helmwise Fellow.