Checklist for Building an Implementation-Ready Plan

Your plan has a complete...

✓ Mission, Vision, and Values Statement

✓ Competitive Advantages

✓ Strategic Objectives/Priorities

✓ Annual or Multi-Year Goals

✓ Annual Initiatives or Department Goals

✓ Action Items or Annual Initiatives

All Goals, initiatives, & actions have...

✓ A single owner, and contributors where appropriate.

✓ A start- and end-date, a measure of success, and end-of-year-target.

✓ A clear label before the goal statement.

✓ Every Strategic Objective has two supporting items.

✓ Every goal has at least 2 supporting items.

We have....

✓ Set up a logo and set planning year in the application.

✓ Established which level of the plan include our KPIs.

✓ Established where we use automated populated satuses based on the performance of its children.

✓ Agreed on usage of hashtagging after the goal statement to filter the All Goals page or Dashboard (i.e.. #Sales / #LATAM / etc)

✓ Outlined the terminology for different levels of the plan (i.e. Strategic Objectives > Corporate Goals > Annual Initiatives > Individual Actions).

Level	Element		Owner	Timeframe
1	What (overall)	Strategic Priorities	N/A	3+ Years
1.1	What (this year)	Company-wide Goals	Executive Leadership	1+ Years
1.1.1	What (this year)	Team Goals	Functional Leads	1+ Years
1.1.1.1	How	KPIs and/or Initiatives	Functional Leads/ Managers	< 1 Year
1.1.1.1.1	How	Individual Initiatives	Managers	Quarterly

Checklist for Leading a
Monthly Strategy Review

Purpose

This checklist is for everyone who is responsible for leading a monthly and/or quarterly results management process, using the OnStrategy Application.

Ownership

All of the tasks below are owned by the Strategy Leader.

One Week Before

✓ **Call with CEO:** Agree on opening comments specific to current state of the business and future looking strategic areas of focus.

✓ **Tweak the Agenda:** Based on call with CEO, tweak the agenda as needed.

✓ **Send out the Agenda, Talking Points and Meeting Reminder:** Send out the agenda, talking points and remind everyone to update their progress no later than the day before the Monthly Review.

✓ **Set up OnStrategy Alerts:** Turn on the Strategy Alerts in "Notifications" to automatically send an email to all participants to update their progress. You only have to do this once.

One Day Before

✓ **Determine Missing Progress Updates:** In OnStrategy, look for those items that have not been updated in 5 days or longer (use the filter to find these). Based on what is missing, send out a reminder to update status using the "Strategy Review" alert. This alert only sends an email to those that have not reported on progress.

✓ **Prepare the Presentation (OPTIONAL):** Sometimes it's helpful to have some initial slides to guide the CEO's comments and/or to remind everyone the flow and their talking points.

✓ **Set Up Custom Dashboard Views (OPTIONAL):** You might want to have custom dashboard views set so you can quickly navigate to a dashboard to support the discussion. This is not necessary if you are leading the conversation via Strategic Objective/Priority by Strategic Objective/Priority.

✓ **CEO Heads Up:** Send a note to the CEO regarding those areas that are off target or of concern so he/she is prepared to dig in where needed.

✓ **Prepare your Leader's Agenda:** Review the results of the goals/initiatives. Make notes of where you want to dig in deeper and where you want to shout out accomplishments. Consider highlighting "movers" - those that have made progress since the last meeting.

Monthly Meeting

✓ **Start with the CEO's Opening Remarks:** Use your slides or simply have the agenda up on the screen.

✓ **Strategic Performance Overview:** Use the Home Page to highlight the overall percentage of goals that are achieved or on target.

✓ **Strategic Objective-by-Strategic Objective:** Run the review SO by SO, following your agenda.

✓ **Wrap Up:** Clarify decisions made and any to dos.

One Day After

✓ **Send out Wrap Up Email:** Send a short email clarifying decisions made and open to dos.

✓ **Update Goals/Initiatives:** Make any changes to the goals/initiatives that surfaced during the review.

✓ **Kudos (OPTIONAL):** If someone has achieved a goal/initiative of note, consider sending a congrats/kudos directly.