

Where do I start?

Start with your numbers, then add your strategy to hit those numbers (Priorities), then create accountability and momentum with a weekly huddle.

Add more numbers and strategies to hit those numbers each quarter. Slow and steady progress is the way to make deep cultural habits.



1 Numbers

Align the team around 1-5 numbers. Fewer is Better.

- Add your numbers as metrics.
- Create your Critical Number(s) Cards - If you are "green" on these targets by the end of the quarter, you're in good shape. These should be attainable yet ambitious.
- Add your leading KPI Cards - These are leading indicators. If you are off track, your Critical Numbers are probably at-risk.

Pro Tip: Use the Upload Metrics feature if your numbers are in a spreadsheet.

2 Strategy

What is the strategy to hit those numbers? Make it a Priority.

- Answer what is your plan this quarter to move the needle on those numbers?
- Make it definitive - how do you know you are finished?

Pro Tip: Add answers to "Why" (Significance/Impact) "How" (Action Plan) and "Success" (Desired Outcome) in the description.

3 Accountability & Momentum

Don't just "set it and forget it" - Create accountability and ownership + keep the momentum from planning/roll out.

- Hold the meeting weekly or Bi-Weekly. It can be part of your current routine!
- 3 Sections to fill out before each huddle - KPI Analysis and Actions, Priority Analysis and Actions, Need Help

Pro Tip: Make it mandatory to fill out each section before the meeting. The updates will be more informative and succinct and the Huddle Recap will be more useful.