

# Strategizing and Rebuilding Using EOS© Tools



SASCHA MANSSON CONSULTING



# Outcomes

- ▶ Develop and set new 2020 goals and strategic plan
- ▶ Create ROCKS (90-day priorities) and road map to execute the plan
- ▶ Develop and implement a scorecard (a set of measurables) to increase accountability

# 2020 Plan

Revenue: \_\_\_\_\_

Profit: \_\_\_\_\_

Measurables: \_\_\_\_\_

## S.M.A.R.T. Goals for the Year

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



# ROCKS Setting 90-Day Priorities

Date: September 30, 2020

Revenue: \_\_\_\_\_

Profit: \_\_\_\_\_

Measurables: \_\_\_\_\_

ROCKS for the Quarter:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_



## S.M.A.R.T ROCK PLANNER



Who: \_\_\_\_\_

Short Title:

Describe the ROCK

Is my ROCK S.M.A.R.T?

Specific: What specifically will I achieve?	
Measurable: How will I measure completion?	
Achievable: Is it achievable by me now?	
Relevant: How is it relevant to our vision and goals?	
Time-framed: What are key dates, what is final date?	

Next Steps

By (Date)	Describe Activity Required for Achieving ROCK	Date Completed
	First Step:	
	Mid Step:	
	Mid Step:	
	Mid Step:	
	Describe your finish line:	

Name / List any Resources Needed for Completion that need to be coordinated or lined up.


Known Barriers/ Limitations


Complete SMART ROCK Planner for each ROCK

Identify the specific outcome for each ROCK

Develop the timeline for completion

Review the Planner each week to keep ROCKS on-track



# Scorecard

- ▶ 5-15 numbers that give you a pulse on your business
- ▶ Set a goal for each measurable
- ▶ Identify who is responsible for each measurable
- ▶ Review scorecard on a weekly basis
- ▶ If goal is not met, develop plan to achieve goal



# Scorecard Example

Measurable	Goal	20-Jul	27-Jul	3-Aug	10-Aug	17-Aug	24-Aug	31-Aug



# Wrap-Up

- ▶ 2020 plan developed
- ▶ ROCKS created and completion set for Sept 30, 2020
- ▶ Scorecard developed, goals set, and ready for weekly implementation







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