A 100-DAY

PLAN TO REMOVE YOURSELF FROM OPERATIONS

A STEP BY STEP GUIDE FOR ENTREPRENEURS AND CEOs WHO WANT TO WORK ON THE BUSINESS INSTEAD OF IN THE BUSINESS

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Introduction

Who this Guide is for

If you are an entrepreneur or CEO who wants to focus on working *on* the business instead of *in* it, then this guide is for you.

I assume when you read this,

- Your day-to-day is keeping you so busy that you don't have time to work on strategic topics
- You feel that if you take a week off, the whole company would stop working
- You have to make all operative decisions
- You're successful financially, but your business eats you alive
- You would not be able to sell your company, even if you wanted to, because you are the company
- All the weight sits on your shoulders

If you're willing to make a substantial change as to how you run your company and are truly committed to achieving an outstanding future for your company and yourself, then please read on.

Enter into the 100-day Challenge!

What to expect and how to use this guide

This guide gives you an actionable 100-day Plan to take yourself out of the operations of your business. It will give you a step-by-step tutorial on how to set up a more autonomous organization that can function without you.

What to expect

With this guide, we go beyond fixing the immediate bottlenecks by aiming at building the operational foundation that will allow your team to operate, develop, and improve the company without you.

Be aware that the success of this guide depends on two things:

- Your commitment to executing all the steps
- The role you want to play in your future company

Not all of the desired results will be achieved within 100 days, but all the necessary tasks can be completed. This guide gives you a structured roadmap of the tasks to complete on your journey to more entrepreneurial freedom.

Each business is unique, but there are patterns in the problems that are holding entrepreneurs back from reaching their goals. Make sure you adjust the steps to your specific situation.

How to use this guide

We have split up the 100 days into 14 steps, one for each week within the 100 days. While you can complete each of the 14 steps as a stand-alone improvement, the real power of this plan is its comprehensive, sequential approach to what makes a well-functioning business.

We recommend that you first read or **browse through the guide in full once**. This will help you to understand the overall structure. Also, you might want to begin to initiate some of the steps that require advance preparation.

Then set a starting date and just get going.

Here are a few tips:

- Follow the weekly cadence.
- Make sure you start tasks on Monday, so you'll have enough time to finish them by Friday.

- Many of the tasks involve others in your company. Schedule meetings with them in advance, so your execution isn't slowed down by the availability of the team. At the beginning of each week, you'll find a list of the relevant players.
- If you don't have a leadership team (i.e., no other managers in your company), you can do the tasks alone or with other capable team members.

Templates

Deliverables in the text are **highlighted in yellow**. Most of these deliverables will link to templates in the **100-day Miro board**. Use these templates to get the full benefits of this ebook.
Copy the Miro board and start working on your own 100-day plan right away.

Examples

All templates are accompanied by an example on how to use them. These examples can be found throughout the ebook. They are built for an imaginary training company for bakeries in the New England area.

What if I need help?

If you need support implementing any of the sections of this e-book, please don't hesitate to reach out to Benjamin @ Asamby Consulting directly.

Book a Call

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About the Author

Benjamin Lander is a serial entrepreneur, consultant and founder of several successful service-based companies.

His main consulting work revolves around the five pillars of people, processes, tools, strategy execution, and leadership.

With his consulting firm, **Asamby Consulting**, he helps CEOs around the world to become more successful and to build autonomous, learning organizations.

"Everything we do at Asamby Consulting focuses on making our clients even more successful. But just more of the same often only leads to burnout and sleepless nights.

"What's necessary is a systemized approach to convert a hero-based business (every CEO is the hero in their company in the early stages of success) into a well-functioning, autonomous organization.

"This is what this guide is for. I hope you enjoy reading it."

For questions about this guide, contact Benjamin at benjaminl@asamby.com.

Connect with Benjamin on Linkedin!

Week 1: Formulate Your Strategy

Input:

- None

Who you'll need (Schedule in advance)

1. Your leadership team
2. Other relevant players, such as shareholders or advisors (optional)

Deliverables

1. Formulated company vision
2. Your company's positioning statement
3. Your short-to-mid-term strategic goals in a numeric expression – next used in [Week 2: Set up a roadmap]

Intro

The fundamental requirement for every successful company is a clear direction. You and your team need to know the goal in order to align efforts. Therefore, formulating strategic goals is a prerequisite for any operational work.

If you already have one of the components, feel free to skip this step. However, do make sure that you have all three deliverables available when completing this first week.

Define your vision

A strategy and strategic goals need to be stable over a longer period in time. If you're not clear where you're going in the long-run, it will be difficult to find a strategy that is that stable.

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Therefore, let's start with your company's **vision statement**. The vision statement describes the purpose of why you are in business. It answers the question: "Why does your company exist?"

Other than the activity-focused mission statement, the vision statement describes an **ambitious ideal future state** for your company, its stakeholders, or society as a whole. The time horizon for a vision can vary between five and 100 years.

Defining this target picture will help you gain clarity about where you want to go with your company.

There are many good resources available free of charge to inspire your vision.

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>
> We envision a future in which artisan bakeries can not only survive, but thrive, by selling and servicing customers in a way that differentiates them massively from all other buying options.

TopTip
Set yourself a clear limit on how long you will spend on your vision statement. Use a simple methodology, have the key players in the room, and then decide on the vision in 60 minutes or less. If you spend longer, you're at risk to over-complicate things and might start boiling down a once ambitious vision to one that's based on today's constraints.

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Define your Strategic positioning

Now that the vision is in place, it's time to get more specific about your strategy. Next, you define your **market** and **unique selling proposition (USP)**.

The time horizon for this strategic positioning is one to five years, depending on how dynamic your company and environment is.

You can develop this positioning by answering two questions:

Where do we play?

This question aims at identifying your **target market** and clients / customers.

Components to consider are:

- Geographic factors: Do you serve a specific city, state, or country? Or the whole world?
- Socio-demographic factors: Who are your buyers? How old are they? Where do they live? How much do they earn? If you're in B2B, you would define target industries and company sizes here.
- Psychographic factors: What's important to your clients? What behavioral patterns do they have in common? What are their pain points? What's the gain they're looking for?
- Other factors that help describing your target market and customers

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The market we serve:
- Artisanal bakeries
- 10 or more employees
- in Connecticut and Massachusetts
- that are willing to train their teams to sell more and serve customers better

How do we win?

How are your clients or customers better off after buying your product or service? Why do they buy from you and not from your competitors? Why do they buy your product or service and not a functional substitute?

Try to carve out your **USPs** here. Remember, this is a strategic exercise, so think about what needs to be, instead of what is.

If you are stuck, you can try to think of the opposite question: Which ones are not your USPs? Many managers make the mistake of listing all possible differentiating factors without accounting for the necessary trade-offs they would require. You may want to focus on Quality and Sustainability (e.g., Patagonia) or on Price and Convenience (e.g., Amazon), but you may hardly have both.

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Our USP:
We deliver better results than our competitors and produce an ROI for our clients of at least 200% in the first year. We deliver well and receive referrals, and our field sales team brings our services to the attention of new leads.

Define numeric goals

With your vision and strategic positioning, you're well-equipped to set some numeric goals. In the end, you're in business to achieve measurable results. These will most likely be financial results, but could as well be other metrics.

Make an ambitious plan about where you want to be one-to-five years from now. If your vision is rather short term (five years), your **strategic goals** should be, too (one year). If your vision is very long-term, your goals can be long-term as well.

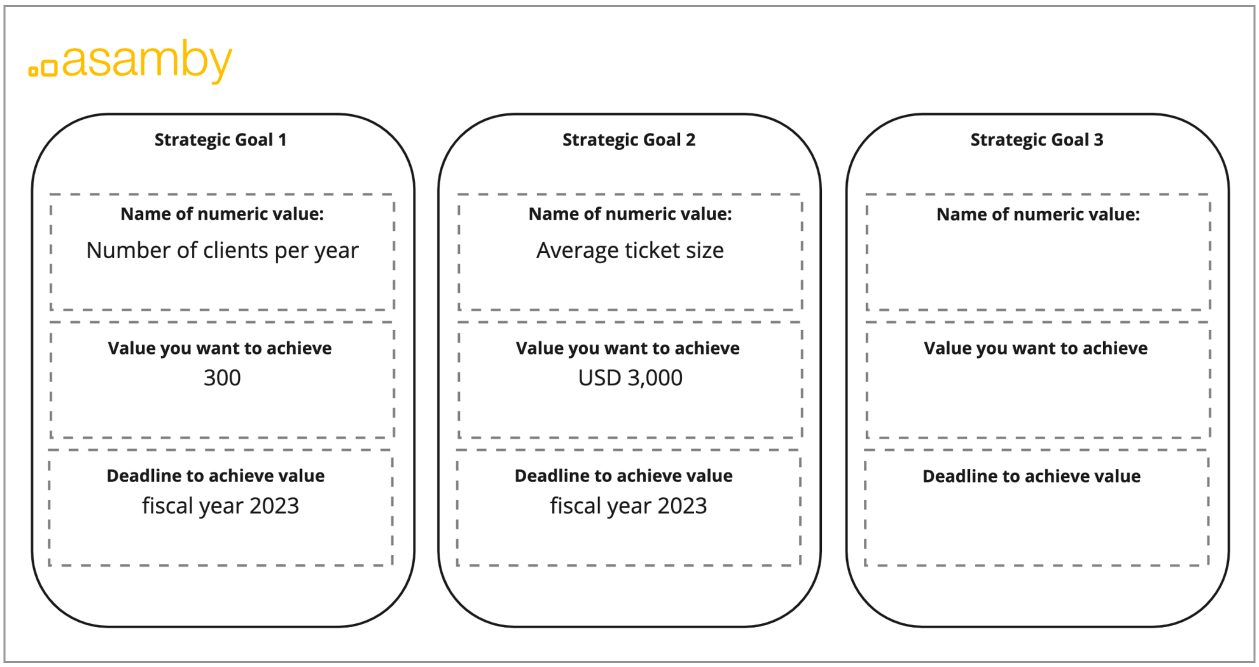
Define all relevant numbers that determine your success. Examples are:

- Revenue
- Sales
- Number of clients
- Number of stores or outlets
- Number of downloads
- Number of monthly active users
- Number of subscribers

Your strategic goals should follow the common quality criteria for goal formulation, e.g., SMART (specific, measurable, attractive, realistic, and timed).

You might have one or more numeric strategic goals, but don't overdo it. As the strategic goal should be a numerical expression of you having reached your strategic positioning, there is no need to become super granular.

We recommend using not more than three numeric strategic goals.



How does this help with getting out of operations?

Defining your strategy is not a one-off exercise. You need to repeat that process every year. This will most likely be a task you'll stay heavily involved in.

So why is this the first step in our 100-day journey?

Because without the strategic direction, your team does not have the chance to develop autonomy. You need to provide clear direction for the team to be able to walk on their own.

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Week 2: Set Up a Roadmap

Input:

- Strategic positioning from Week 1: Formulate your strategy
- Strategic goals from Week 1: Formulate your strategy

Who you'll need (Schedule in advance)

1. Your leadership team

Deliverables

- [ ] Your roadmap to reach the strategic goals (next used in Week 3: Define the org-structure and empower the new leadership team and Week 5: Communicate plan and new responsibilities to the team)

Where are you today

In your strategic goals, you have defined where you want to be at a time in the future, e.g., a year from now. To know what's necessary to get there, you have to first have a clear assessment of where you are today.

It's important to be brutally honest with yourself and to not sugarcoat your assessment. This might be no problem for the numbers (sales figures, etc.), but it's easy to blame others for the reasons.

Extract all components of your strategic positioning and targets

First, you need to extract all components and dimensions of your strategic positioning and strategic goals. This way you'll know what to analyze today.

An Example:

Your Positioning:

- We serve bakery shops with ten or more employees in Massachusetts and Connecticut that are looking to train their employees in sales techniques and customer service onsite. (Where do we play?)
- We deliver better results than our competitors and produce an ROI for our clients of at least 200% in the first year. We deliver well and receive referrals, and our field sales team brings our services to the attention of new leads.

Our strategic goal:

- At the end of 2023, we will have trained 300 bakery shops at an average ticket size of $3,000..

Next, go through these statements and **identify all the variables**, metrics, and decisions that you make. They're highlighted in yellow.

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Dimension	Status Quo	Target	Gap
Type of business		Bakery Shops	
Employee count		Ten or more employees	
Geography		States MA and CET	
Type of offering		Training onsite	
Client ROI		ROI 200%	
Client acquisition		Referrals + Sales Team	
Number of clients		300 bakery shops	
Ticket size		Ticket Size 3,000	

What's the gap?

Once you have the variables identified, you need to map where you stand at these today. You can use a simple table like the one below for your **gap analysis**:

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Dimension	Status Quo	Target	Gap
Type of business	We work with a variety of smaller shops	Bakery Shops	
Employee count	Average 5 employees	Ten or more employees	
Geography	Only CT	States MA and CT	
Type of offering	Only remotely	Training onsite	
Client ROI	Not measured, probably 100%	ROI 200%	
Client acquisition	Only referrals	Referrals + Sales Team	
Number of clients	180	300 bakery shops	
Ticket size	2,200	Ticket Size 3,000	

What steps are necessary to close the gap?

Now that we've identified the gap, you have to develop an action plan to close the gap.

Dimension	Status Quo	Target	Gap / Action Plan
Type of business	We work with a variety of smaller shops	Bakery Shops	Focus solely on bakeries
Employee count	Average 5 employees	Ten or more employees	Attract larger bakeries
Geography	Only CT	States MA and CT	Expand to MA
Type of offering	Only remotely	Training onsite	Add onsite training
Client ROI	Not measured, probably 100%	ROI 200%	Follow up on success Offer follow up training after 6 monhts
Client acquisition	Only referrals	Referrals + Sales Team	Build sales team
Number of clients	180	300 bakery shops	Increase market share CT and add MA
Ticket size	2,200	Ticket Size 3,000	Add ons, increased ROI

This is a qualitative exercise. The answers can be very simple or very complex.

Examples:

- When thinking about where the additional 120 bakeries compared to this year would come from, there will probably be a mix of repeat clients, increasing market share, and selling in new geographies.
- Looking at the average deal size, the difference between today and the goal of $800 could come from different sources (e.g., upselling with add-ons, increased perceived value through onsite training, better sales material).

You'll have to spend some time on these things to really come up with a solid **action plan per gap**. It might be worthwhile to look out for some problem-solving techniques (here's a book we liked).

Per goal variable, you should end up with a maximum of three key initiatives or deliverables that need to be addressed.

Gap / Action Plan	Initiative 1	Initiative 2	Initiative 3
Focus solely on bakeries	Enrich training offers with bakery specific content	Redesign website	
Attract larger bakeries	Collect referrals from existing larger clients	Add multi-location content to training programs	Develop multi-location deals
Expand to MA	Launch Online Marketing Campaign	Ask for contacts from past clients close to border	Build lead list and have sales team tackle the list
Add onsite training	Convert online material into onsite material	Add onsite specific training componentes (role play etc.)	Change website, develop pricing structure
ROI: follow up on success Offer follow up training after 6 monhts	Define follow up sequence after training and run it	Develop 6 month touch up offer	Develop online follow up sequence
Build sales team	Define profile	Hire local sales reps (MA/CT)	Train Sales Team on offering
Increase market share CT and add MA	see above (PPC and Sales Team)		
Add ons, increased ROI	Develop add-on offerings		

What needs to happen on a quarterly basis?

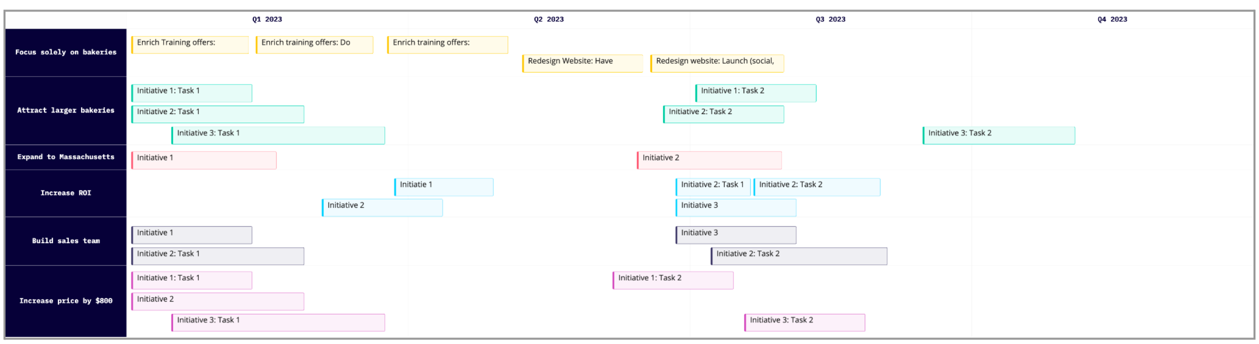
As a next step, you have to plan out how you want to tackle these things. Depending on the time horizon and maturity of your team, you want to get more or less granular. During this initial planning phase, we recommend sticking to quarterly planning.

You define what needs to happen for each quarter between today and your deadline of the strategic goal.

If you like, you can already break down the tasks by function. This way, you would come up with a quarterly set of goals for marketing, operations, etc.

Naturally, you'll want to plan out the upcoming quarters more thoroughly than the ones that are further in the future. Also, quarterly plans need to be reassessed.

This breakdown plan on how to execute strategic initiatives is your **roadmap**.



Pro Tip:
Schedule the next quarterly strategy execution meetings now so you have them in the calendar.

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Week 3: Map Your Processes and Find Bottlenecks

Input:

- The Roadmap from Week 2: Set up a roadmap

Who you'll need (Schedule in advance)

1. Your leadership team (developing the value chain)
2. The full team (by process, for process capturing)

Deliverables

- [ ] Your value chain, including your main value generating activities, supporting processes, and process headlines
- [ ] Process maps of your most important business processes, including identified bottlenecks
- [ ] Mapped out and assigned tasks to remove bottlenecks

As a preparing exercise for the following weeks, you'll need to get an overview of your processes.

Identify all relevant processes using a value chain exercise

A **value chain** is a graphical representation of your core processes and your supporting processes.

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Core processes, or value-generating processes, are all sequential activities that you perform that generate value.

What generates value? Ask yourself this question:

"If my customers knew I was doing this, would they be willing to pay for it?"

If the answer is yes, you're looking at a value-generating activity, e.g., most manufacturing processes are value generating activities. Often, sales and marketing is considered value generating, because customers want to learn about your products.

If the answer to the question above is no, then you're looking at a non-value adding activity. While they don't directly contribute to the value proposition, they will, in many cases, still be necessary to run your business.

Examples for supporting processes:

- HR
- Finance
- Technology
- Admin

For our bakery training, the value chain might look like this.

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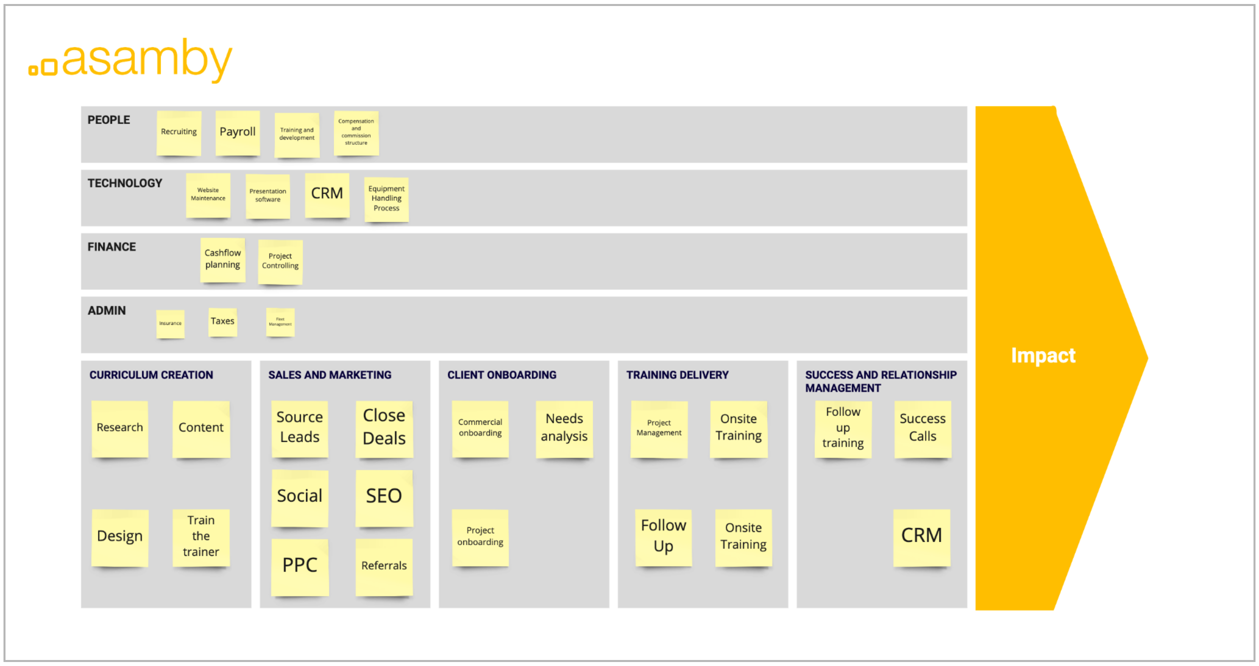


To arrive at your value chain, follow these two steps:

1. Define the high-level headlines for the gray boxes. What are the main areas in your company that drive value for the client? And what are the support functions you couldn't do without?
2. Collect all the relevant processes in each area (yellow sticky notes). Headlines are enough here. You're looking at the what, not the how.

Please note that this is still a high-level exercise aimed at capturing macro-activities; finer details will be added in the specific process mappings.

Don't forget your Admin Processes

There's usually a bunch of processes that you take care of that are very administrative. You hold them because it's your company. Examples:

- Dealing with insurance
- Taxes
- Payroll, bookkeeping, and accounting
- Memberships
- etc.

Make sure you add them here so they are part of the delegating exercises later.

Map the main processes in a swimlane diagram and identify where you are the bottleneck

Now that you have an overview of the processes you have, you want to find out where there are problems. The biggest problem being you!

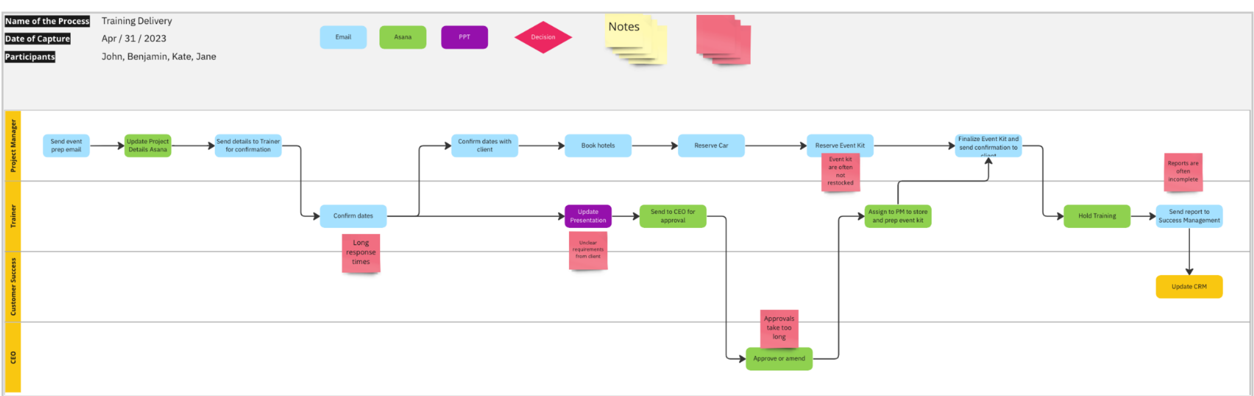
Wait, what?

If you want to remove yourself from the day-to-day of your business, you first have to remove yourself as the bottleneck from your key processes.

Map the Process

To do that, the first is to map the processes. Here's how:

Use a **swimlane diagram**.



More details in the template, but here's how it works:

- Each lane represents a role in the process.
- Map each step using a box.

- Change lanes when responsibilities change.
- Use a different colored box for each software or tool.
- Use yellow sticky notes to capture additional information.
- Use red sticky notes to capture everything that is not working:
    - Missing tools
    - Broken processes
    - Bottlenecks, etc.

On average, it's fair to assume that one process capture takes around two hours.

Pro Tip:
Set yourself a time limit of two hours for a process capture. This will automatically balance detail and practicality. All details that you can't capture need to be captured in a sub-process if you can't do without them.
Depending on your complexity (mainly a function of business size), it might be enough to have one process map for each grey box in the value chain. Go more granular (sticky note level) if needed.

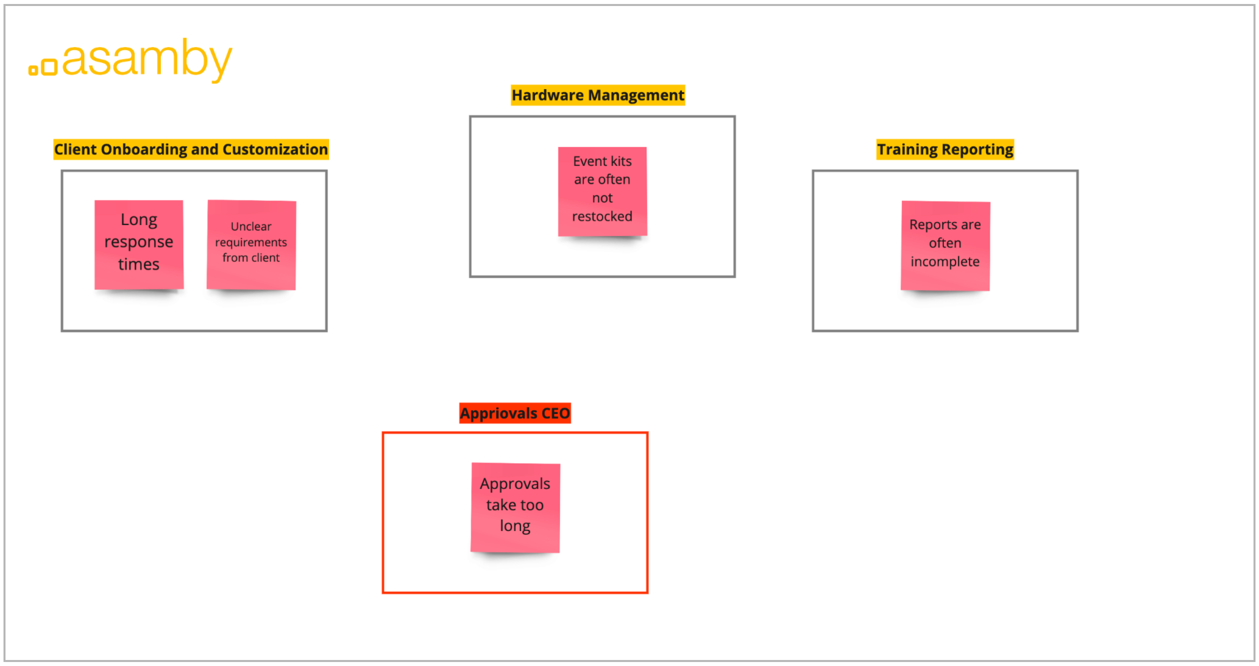
Cluster the findings

After you have captured everything, for now you want to pay special attention to the red sticky notes. Highlight all of them, copy them and paste them into an **empty area to cluster** them.

Watch out for cases where:

- Your team waits for your approval
- You need to make decisions
- You're not sharing information or best practices
- You don't hand over information properly
- You can't let go of tasks because you think nobody can do them as well

These represent your bottlenecks.



You'll have to do this for all of your most important processes (see value chain). The question of how granular you get in analysis depends on how good your and your team's understanding of the process is.

Assign responsibilities to resolve bottlenecks

You know what processes keep you busy, now you need to change that. Take your groups of clustered findings and assign them to someone to resolve.

Examples:

- You have a cluster that's called: John is the bottleneck because he needs to approve everything before we send it to a client.
  → You can assign that cluster to someone in your team to find alternate ways of quality assurance.
- You have a cluster that's called: Event Kits are often not restocked.
  → You can assign that cluster to Jane, to write a standard operating procedure and checklist on how to restock the event kits..

For the sake of this 100 day challenge, you might want to focus on the clusters that involve you. But you definitely should tackle all clusters identified.

Create some form of tracker (**Kanban board** in your task system, spreadsheet, whiteboard) to keep track of where the initiatives are.

Special Case Service-Based Business: You Generate much of your business' revenue yourself

The mother of all bottlenecks in small business, especially service-based ones, is this: You generate most of your revenue.

Overcoming this initial burden is one of the hardest things in the early stages of (service) business.

The steps to remove yourself as the cash flow bottleneck

1. Make sure your current revenue can afford having you (at least partly) out of the delivery; if not, increase demand and top line revenue. You have to create more business than you can handle personally.
2. Start looking for the right people to take over some of the cash flow generation. If you already have a capable team, great. If not, you can't start early enough.
3. Standardize products and services to make it easier to train someone on them.
4. Bring your team members into the delivery. Either give them the lead in a new project/with a new product, or let them shadow you. They need firsthand experience.
5. Accept the fact that they will do things differently and that they might eventually mess things up. Your job is to clean up.

If you can't perform these five steps, you aren't ready yet to get out of the operations. Performing them might also take longer than a week –in this case, do this first before you move on.

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Week 4: Define the Org-Structure and Empower the New Leadership Team

Input:

- Strategic positioning from Week 1: Formulate your strategy
- Strategic goals from Week 1: Formulate your strategy
- Roadmap from Week 2: Set up a roadmap

Who you'll need (Schedule in advance)

1. Your leadership team

Deliverables

- [ ] Target org structure (next used in Week 5: Communicate plan and new responsibilities to the team)
- [ ] RACI Matrix (next used in Week 5: Communicate plan and new responsibilities to the team)
- [ ] Job descriptions
- [ ] Recruiting Roadmap
- [ ] Decision-making frameworks

Decide what you want your future role to look like

Now that you know where you want your company to go and how to get there, it's time to ask yourself the central question of this guide:

What do you want your future role to be?

The answer to this question is critical when determining what the future organization will look like. Here are a few options to consider.

The Involved CEO

You want to stay fully involved in the company. You just want to choose which tasks get your attention and which don't.

In this scenario, make a list of topics you want to stay involved in. Don't be afraid to make your own choices here; forget the online wisdom for a while about what a CEO has to or mustn't do.

A profile could look like this:

As a CEO of my company, I want to work on

- Product development
- Sales
- Strategy

In this scenario, you'd have to assign all other critical functions to someone else.

The functional head

If your list from the above exercise doesn't include typical CEO tasks (strategy, financial decisions, management), then you might want to consider handing over the CEO role as a whole.

You would be surprised how often entrepreneurs despise classical CEO tasks. If you look at it in more detail, it's no surprise: Most people that start companies do so because they're really good at a specific thing. And naturally, at the beginning this is not leading a company, but something else – like product development or sales.

So unless you grow into the role of the CEO and really like it, chances are that you might feel more comfortable in a functional position. (Gymshark is a vivid example of what that can look like – including reclaiming the CEO position after a few years.)

The strategic CEO

In a very traditional setup, the CEO would develop and decide on strategy. And would rely on a strong number two, the COO, to execute pretty much everything else.

This would leave you in a role where you are still involved in the company's day-to-day, but more from a supervisory standpoint.

The Shareholder / the Exit

The most detached form of role in the company is when you just hold it as an asset without any involvement in the day-to-day or strategy execution.

In this scenario, you would be a shareholder. This means that all offices and functions would be held by someone else. Certainly the most long-term position to be in, but also the highest form of "removing yourself from the operations".

Similar to the shareholder is when you're aiming for an exit, i.e., selling the company at a certain time.

A potential buyer would probably love to see the same autonomy in the company that you would like to have when stepping back from all offices to become a shareholder.

Developing your organizational structure

Next, it is important to develop an understanding of what your **organizational structure** needs to look like.

Define which functions are and will be critical in the execution (roadmap) of your strategy.

First, look at your strategic position, especially the “How do we win?” question. This question will tell you what is a USP for your company. The things that set you apart from your competition should find their reflection in the org-structure.

An example:

- If your strong field sales team is what sets you apart from your competition, then you need sales to be present at the highest level in the company.
- If you’re placing a strong emphasis on the ROI of your service, then you might want to have a function that ensures this customer success.

There’s no mechanistic way of determining what needs to be present in the highest organizational level, but the basic rule of thumb is: If it’s critical for your strategy, the function needs to be present in the leadership team (i.e., the highest level or your structure).

Choosing an Org-Structure Blueprint

There are a few fundamental ways to structure your organization (find more information here). An overview:

The simple structure

This is what you start off with. Everybody reports to the founder. No further structures.

+ Simple and quick
+ Control for the founder
- Not scalable

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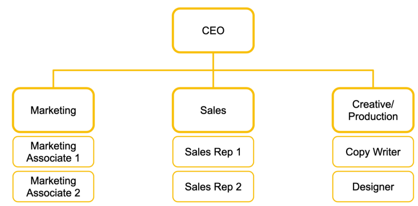
The functional structure

Usually the first structure after the simple structure. People are structured by the function they have.

+ Easy to manage
+ Easy to attract talent
+ Easy to build functional expertise
- Potentially decreased customer focus
- Might lead to silo thinking

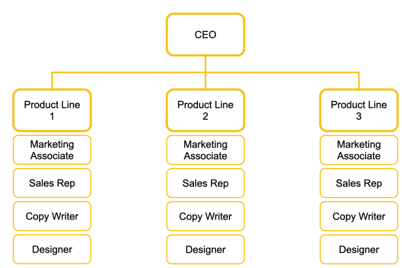


The divisional structure

In this structure type, roles are structured by other relevant business dimensions. Common types of divisional structures included:

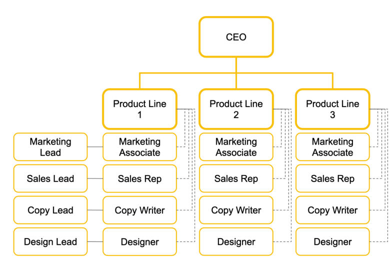
- Geographic divisions (Europe, Asia, North America)
- Division by market segments (consumer, small business, mid-market)
- Division by sales channel (online, own-retail, wholesale)
- Division by product or application (product line 1, product line 2)

+ Accounts for your different business areas
+ Can be customized to your needs
+ Customer, product, business focus
- Harder to build functional expertise
- Duplicate functions
- More complex to manage



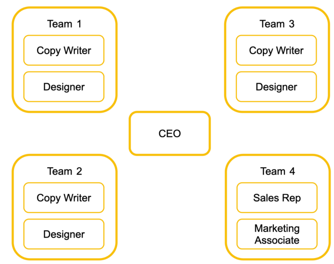
The matrix organization

The matrix organization is a combination of either a functional and divisional structure (most common) or of two different divisional approaches. It seeks to combine the benefits of both and is common in larger organizations. It has two major downsides: complexity and ambiguity.



Team-based structures

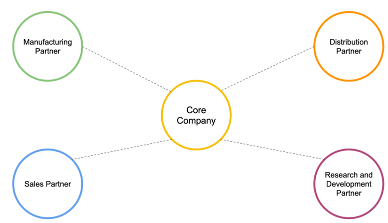
In a team-based structure, you set up autonomous teams that are composed of all relevant functions to produce meaningful results for your clients (e.g., the pod structure in media agencies).



- \+ Quick and good decision making
- \+ High employee engagement
- \- Difficult to set up and manage
- \- Not for every employee

Network structure

A network structure uses external partners instead of building internal headcount.



- \+ Quick to set up
- \+ Flexible
- \- No internal know-how development
- \- Operations are subject to market forces

Pro Tip:

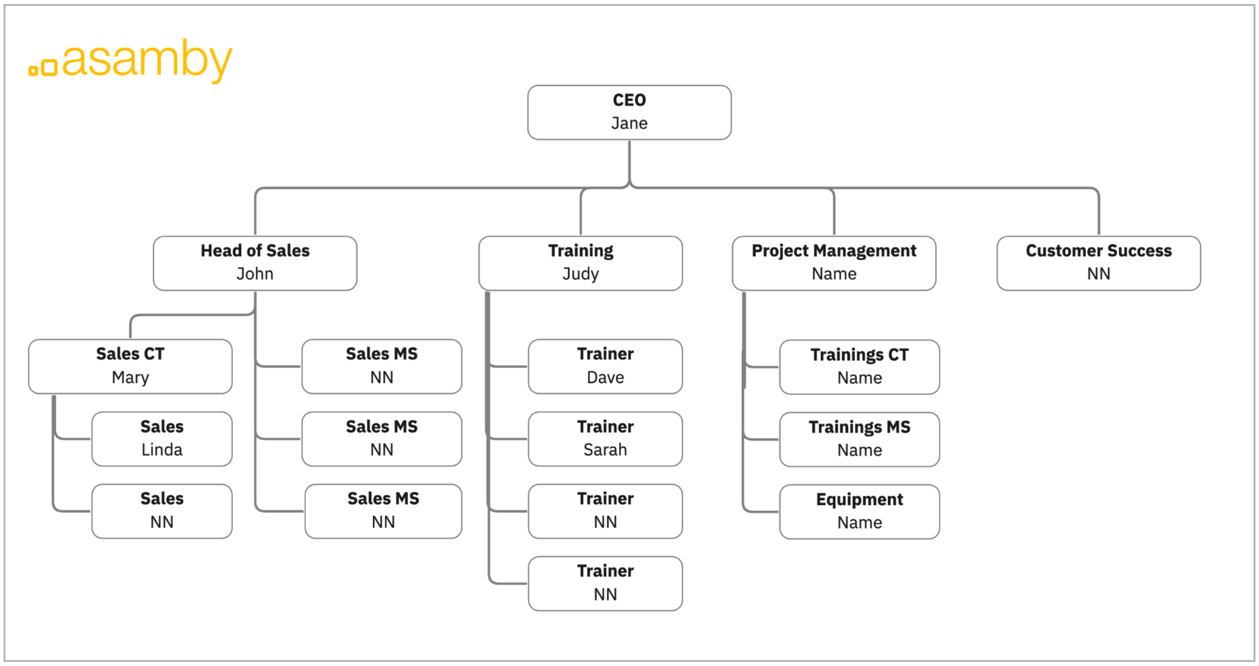
- Keep it simple. For most companies with up to 50 employees, a functional structure will be the easiest choice. Also, in reality the structure types are often mixed. Example: You might have a functional structure where you outsource some function, i.e., functional + network structure.
- Plan the org structure without thinking about your current team. Map out what makes sense in an ideal world. Then assign roles to people. In reality, most team members will hold more than one role. But this way, you know what positions you need to fill in the future.
- One reporting line per person (unless you deliberately decide for a matrix structure).

Headcount per role

When you design your future org structure, a central task is to define the number of people you need per role to achieve your business goals.

Example:

If you're currently doing 100 trainings a year with two trainers, it's a fair estimate that it will take six trainers to do 300 training sessions per year – if nothing else changes that impacts efficiency, like mode of delivery or change of the service, that is.



You need to extrapolate headcount for all roles in your future org chart.

Develop RACI – Responsible, Accountable, Consulted, Informed

The **RACI Matrix** has a terribly dry image. But it actually is at the very core of whether or not you are successful.

It marries the processes from your value chain with the people and roles in your company. Before RACI, it's all theory. Once you have the RACI matrix defined, you're ready to take over the world.

So in this following step, you will set up the RACI matrix for your business.

The components of a RACI matrix

You need to set up the following components for your RACI matrix:

Roles
All of your company's roles are mapped as columns in your RACI matrix. One column for each role. You can find all your roles in the org chart you just created.

Processes
All your processes are rows in the RACI matrix. How granular you get is your choice and depends on whether there's a need to specify responsibilities at a detailed level. To keep things simple, start with making each yellow sticky note from your value chain one row in your RACI matrix.

Responsibility types
The responsibility type describes in which way a role is involved in the completion of a process. In the standard model, there are four different types of responsibility:

- Responsible (R): The person that does the work to complete the task
- Accountable (A): The person that has to manage and monitor completion of the work and needs to answer to management or clients when the work is not done or done poorly
- Consulted (C): A person that is only consulted for input (opinion or expertise)
- Informed (I): A person that's only informed about the task progress or its completion

For each role/process combination, you have to write down which of the letters are applicable. It's possible to need more than one letter (often R+A) or no letter (not involved in a process at all)

	CEO	Head of Sales	Sales	Head of Training	Trainer	Head of PM	PM	Equipement Mgr	Customer Success
Content Research	C			A					C
Content Creation				A	R				
Curriculum Design	R			A					
Train the Trainer	R			A					
Source Leads	C	A	R			I			
Close Deals		A	R						
Commercial Onboarding			C			I	A/R		
Onsite Training					A/R		I	C	
Follow Up					A/R				
Success Calls					C				A/R

Pro Tip:

- While there might be more than one person responsible (R) per task for more complex tasks, there can always only be one person accountable (A) per row. This is where the buck stops.
  If each process has one A, you have a mutually exclusive, collectively exhaustive responsibility map. Nothing can fall through the cracks.
- As the goal of the whole exercise is for you to get rid of operational tasks, make sure you have an inventory of your day-to-day workload and assign all the tasks that you don't want to do anymore to someone else.
  The A might stay with you, but the doing needs to move to someone else. This might include decision-making.

Identify Skill gaps and training needs

Now that you know exactly what is expected of each role, you can bring back the people and add them to the role. Map out how well people are equipped to or already have demonstrated that they can perform a certain task. We call this tool a **skill matrix**.

Write all the names of people that either hold the role (for existing roles) or are potential candidates (for new and existing roles) next to it.

Put as many columns as you need headcount for that role (see above).

Trainer	Involvement	Dave	Sarah	NN	NN
Content Creation	R	okay	great		
Onsite Training	A/R	great	okay		
Follow Up Training	A/R	great	okay		
Success Calls	C	poor	okay		

Processes where a role only is to be consulted or informed don't play a huge role in identifying training demands. They're filled gray in the example.

Here, we do see, however, that we have to train Dave in giving better input for success and. Resist the temptation to change job profiles to fit the skill-sets of your team members.

In this example, we have two sales rep positions in our future org chart that are not filled yet at all. This will need to go into your recruiting pipeline.

Job Descriptions

Use the results from your RACI matrix to build easy and consistent **job descriptions**.

They should include a high-level role description as well as the accountabilities and responsibilities from your RACI matrix. Add required skills if you like.

Trainer

Department: Training | Reports to: Head of Training

Hours per Week: 40 | Location: Onsite for trainings, work from home in between trainings

Role Description

The trainer trains our clients' staff in providing outstanding customer service and selling well.

Accountable for

- Prepare and hold onsite trainings
- Prepare and hold follow up trainings

Tasks

- Prepare and hold onsite trainings
- Prepare and hold follow up trainings
- Support Head of Training in creation of training content
- Consult Customer Success Manager when preparing customer success calls.

Skills (Optional)

- Onsite training experience
- Bakery experience preferred

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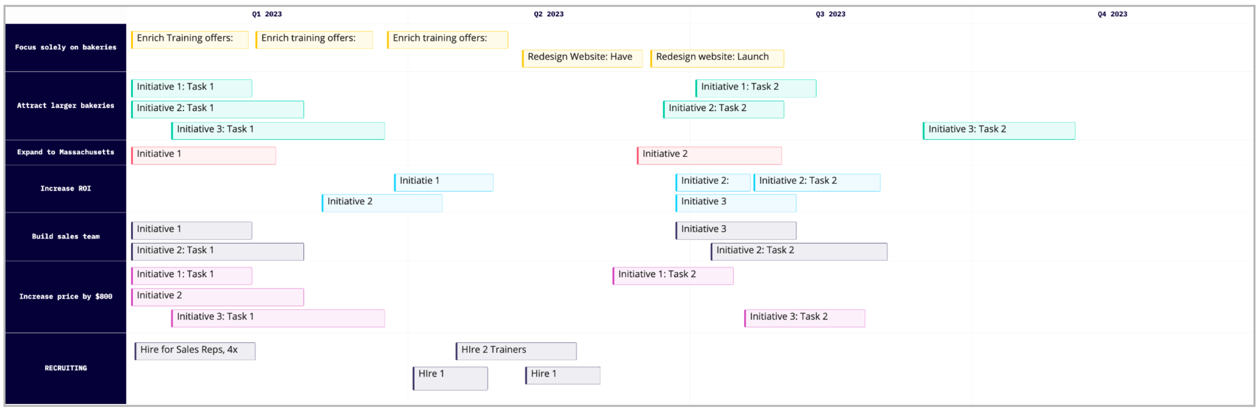
Recruiting Roadmap

On top of your strategic roadmap, you are now able to build a **recruiting roadmap**. Map out at which point alongside your strategy execution you will need to fill certain positions. You can simply add a lane to your roadmap.



Pro Tip:
When mapping out your hiring strategy, don't forget to account for the gap between starting your hiring efforts and the point in time when the new hire is operational. Example: When you need a new sales rep in October, you have to start hiring between February and August, depending on how long onboarding takes and how quickly you will be able to fill the position.

Get buy-in

Before moving on, you need to discuss the new responsibilities with your leadership team. It is critical that they are on board. Ideally, have one-to-one sessions with them to hear nuances beyond peer pressure.

Define decision-making and conflict resolution process

Ideally, what you've done this week is to shift responsibilities from your shoulders to your team's.

This will require them to be able to:

- Make decisions that you used to make, and
- Resolve conflicts that you used to resolve.

You need to define how this works. Here are a few questions that your decision-making framework needs to answer:

- Are decisions being made unilaterally?
- If not, what type of majority is needed in the leadership team?
- For which decisions do you need to be involved?
- Are there value thresholds or types of decisions?
- Are there veto rights?
- Can someone overrule the others for his or her own department?
- Can the leadership team change the strategic goals, positioning or roadmap without you?

You are aiming to find a balance between autonomy and ensuring you are still part of the critical decisions.

Week 5: Define and Implement KPIs

Input:

- Strategic positioning from [Week 1: Formulate your strategy]
- Strategic goals from [Week 1: Formulate your strategy]
- Roadmap from [Week 2: Set up a roadmap]

Who you'll need (Schedule in advance)

1. Your leadership team
2. Your IT or tech person

Deliverables

- [ ] A set of key performance indicators to track for the company
- [ ] A set of key performance indicators per department
- [ ] A document that outlines the collection process
- [ ] A structure for a dashboard to track KPIs

Define metrics on a company level

If you really want to remove yourself from the day-to-day of the company, you need to have KPIs. There are two reasons:

1. Steering function: They allow you to set targets for your team, with a clear metric to tell whether the target has been achieved.
2. Reporting function: With an effective KPI set, you always have your company's health available at a glance.

In the first step, you have to set up KPIs on the company level. They will build the basis for other, more granular KPIs in your company.

Step by step to your company KPIs

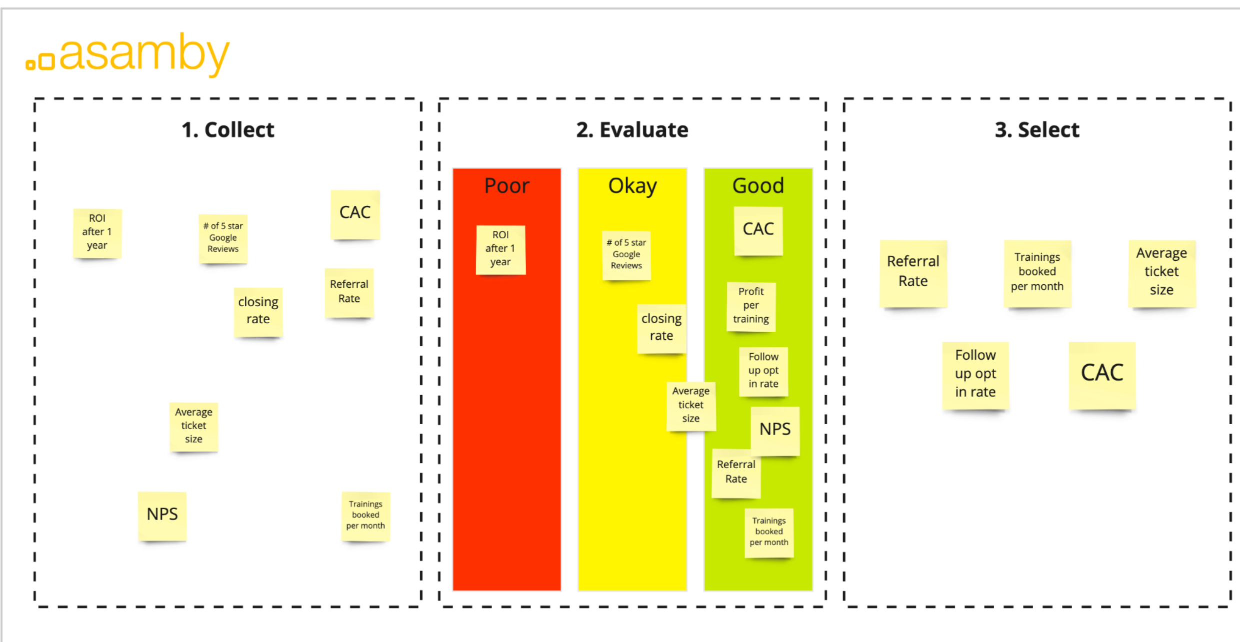
- Plan a joint workshop with your leadership team.
- Send out your strategic positioning and goals as a refresher in advance.
- Ask your team to prepare the metrics they think best reflect the goal you want to reach.
- In the joint workshop, collect all KPIs.
- Test them for the quality criteria below and exclude the ones that don't meet them.
- Synthesize and merge or delete duplicates.
- Boil it down to four-to-ten KPIs on the company level. More KPIs mean more granular insights, where fewer KPIs mean easier to track and clearer focus.

Evaluate by Using KPI Quality Criteria

There are a few quality criteria for a good set of KPIs.
You might not reach 100% compliance, but you still want to watch out for these factors.

- The **3M**: Make sure your KPIs are **meaningful, measurable,** and **manageable**. If your KPIs measure something that's not relevant, that does not make sense. If the idea is great, but you (technically) can't capture the information, that's not a great KPI. Lastly, if you can't influence what you're measuring (e.g., market size), that number might be interesting, but it's certainly not a good KPI.
- **Leading, not lagging**: Wherever possible and appropriate, include also metrics that are early in the process. If you pick only metrics that are very lagging, i.e., downstream, you will have no chance to correct the results in time.
  Example: Using Google customer reviews as a KPI for quality is very lagging – at the time a customer gives you a bad review, it's too late. Instead, use customer support tickets count or – even earlier – quality gate metrics from your production process.

- **Output, not activity**: Try to find metrics that measure the results you're looking for, not the activity that leads to it.
  Example: Don't measure the number of sales calls, but the number of calls that lead to something.
- **MECE**: Make sure your KPIs are mutually exclusive and collectively exhaustive. There shouldn't be any overlap, otherwise you're measuring the thing twice and that could give it more weight than you might intend to.
  On the other hand, try to exhaust all strategically important topics. That doesn't mean you should have a metric for each and every detail, but rather that you cover all strategically relevant metrics with one KPI.
- Simulate unintended **second and third level consequences**: Your team will optimize for the KPIs you define as important. This might lead to unintended behavior. Try to explore these behaviors by thinking through what optimizing for a KPI you want to use might lead to in the worst possible case.
  Example: If you optimize for the number of closed deals, your team might be motivated to sacrifice profit margins. You may thus consider a more comprehensive metric or balancing it with a profit-oriented one.



Pro Tip:

Make sure you have some key financial KPIs that you track. Choose numbers that show you the financial health and success of your company. We recommend having at least one cash-flow and one profit-related KPI in your set.

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Break down KPIs per department

With the list of company-wide KPIs, you can now break the KPIs down into department KPIs. There are three ways of doing this:

1. A joint exercise with your leadership team (recommended): Develop the department KPIs together with the leadership team. In your workshop, allocate 30 minutes for a quick session. Don't come up with too many KPIs (four-to-ten is again a good number). This exercise will also show you if your company level has been exhaustive.
2. You develop the KPIs per department/function alone. This might be necessary if you don't yet have a capable or experienced team.
3. You let the leadership functions develop their own KPIs. This requires you to review and discuss them afterwards.

The process is similar to the one on the company level:

- Break down the strategic positioning and goals into what they mean for each of the departments.
- Use company-level KPIs and determine how a department contributes to them.
- Repeat the steps for each of the company-level KPIs.

Pro Tip:
Not all functions in your business will be contributing to a company-wide KPI. Supporting functions are necessary, but their performance is often not critical for reaching your strategic goals.
If there's no KPI from the company level to start the process on the department level, just start from scratch. An (unlikely) example: Your strategic goal has no implications for HR. HR could then go and formulate their own KPIs by looking at the strategic goals.

Set Goals

As this might be the first time you actually have KPIs in place, ideally you want to specify the **KPI targets** right away.

For each member of the leadership team, negotiate where the KPI needs to be at the end of the strategy time horizon.

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Name	KPI	Target Value	Deadline
John (Sales)	CAC, Trainings booked per month	300 USD 35	Dec 31st 2023 Aug 31st 2023
Judy (Training)	Referral Rate	25% of clients refer another lead	Oct 31st 2023
NN (Project Management)	Profit per training	800 USD	Dec 31st 2023
NN (Customer Success)	Follow up Opt In Rate	50%	Aug 31st 2023

If you have the buy-in for both the choice of KPIs as well as their target state, then your leadership team has all the direction and clarity they need to perform well without you.

Define responsibilities for data and tracking

For all KPIs that you define, you need to define a role or person that's responsible for collecting data and updating the KPI. That doesn't have to be the same person that's responsible for moving the needle.

Ideally, you set up a standard operating procedure that specifies:

- Who is responsible for collecting the KPI data or

- Who is responsible for maintaining an automated collection process
- When/how often the data is being collected
- Where it needs to be entered or stored.

Build a dashboard

The steering function of the KPIs is covered by the commitment and goal setting of the leadership team.

To also leverage the reporting function, you need insights into your KPIs. So you want to collect them in one place. And as numbers are not as nice to look at and easy to process as pictures, you also want a graphical display of the KPIs. You need a KPI dashboard.

Involve your IT or tech person in this conversation. You need to figure out three questions:

1. What is the best way to display each KPI? Is it a bar, a pie, a trend line? Do you need a timeline or just a snapshot?
2. Which tool (most likely software) is the best to house the dashboard in?
3. Where is the data coming from and how is it pushed into your dashboard tool?

All of these questions influence each other, so it often is a tricky one to figure out.
Your best starting point will be Google sheets. It's very versatile, you can build whatever you need, and it connects well with virtually every other tool (by using no-code tools like Make or Zapier).

Pro Tip:
Don't confuse your KPI dashboard with a Business Intelligence tool. The latter allows you to look at larger numbers of real-time data points in real-time and from different angles. Its use case is custom insights, when you need them.
A KPI dashboard looks at a small and static set of key numbers, and the data might be updated only monthly or even quarterly. Its main use case is to monitor company health and progress toward reaching strategic goals.

Week 6: Communicate Plan and New Responsibilities to the Team

Input:

- Strategic positioning from Week 1: Formulate your strategy
- Strategic goals from Week 1: Formulate your strategy
- Roadmap from Week 2: Set up a roadmap
- Org structure and job descriptions from Week 4: Define the org-structure and empower the new leadership team
- KPIs from Week 5: Define and implement KPIs

Who you'll need (Schedule in advance)

1. Your whole team
2. Individual sessions with the team members by your leadership team. If you don't have one, you'll have to do these one-on-ones yourself.

Deliverables

- [ ] A name for your strategy and change initiative
- [ ] An agreed upon target picture, supported by an engaged team
- [ ] Signed job descriptions from each of your team members
- [ ] Training demands, based on job description sign-off

Present the strategy to the team and get them on board

This week is all about rallying the troops. It's not enough to inform them about what you've been working on. The goal is to get their buy-in on where you want to go with the company.

Preparation

Communicating your strategy and the changes you plan to make to the company is a critical step in the process of removing yourself from the operations. It needs proper preparation.

It might make sense to come up with a cool name for the effort.

Examples:

- Bakery Training 2.0
- Bakery Training Reloaded
- Bakery Training __Next
- BT2024 (Initials + YYYY)

You probably can come up with much better ideas. A name will help communicate the effort and keep conversation going after the initial handover.

To prepare for the meetings and handovers, you will want to formulate the answers to the following questions (from your team's perspective):

1. **Where are we going and why?**
   You need to clearly outline the vision, strategic positioning, and strategic goals. Specifically, spell out why this is an attractive goal to attain.
   Also, draw a rough outline of the roadmap and let the team know that the leadership team will work with them to define their individual contributions (i.e., individual roadmaps).

   In addition, you'll need to introduce the changes to the operational and organizational structure to the team. Tell them which responsibilities change and why this is happening.

   Phrase things in a way that paints a positive picture for the future. Don't get caught up in talking about what isn't working today.

2. **What is expected from me?**
   You have to tell your team exactly what you want from them. This includes various dimensions.

How will a change in org structure affect them? What new responsibilities will they have? Which existing responsibilities will go somewhere else?
But also, how will they need to contribute to the strategy? And what will their role be in an operating model where you as the CEO take a more strategic approach?

3. **What is in it for me?**
Last but not least, spend a good amount of time spelling out why the changes that are ahead are a great thing for everyone.. Explain how your team members will be better off in the future. A few examples:

    - More available decision makers and quicker feedback
    - Enriched job profiles through company growth
    - New exciting roles and career opportunities
    - More role clarity and more process stability
    - A say in how the company develops and how processes are being executed

4. **What's next?**
Tell your team what the next steps in the process are. This will pretty much be a summary of the remaining steps in this guide, before you enter into executing based on your strategy execution roadmap.

The Townhall

What medium you use to communicate the answers is up to you. Some prefer Powerpoint or other presentation tools, others prefer speaking freely or reading from a manuscript.

Choose a tool that you're comfortable using. Try to be as engaging as possible. It goes without saying that this means you'll have to prepare a face-to-face session. An email or other asynchronous tool will not be sufficient.

In the first step, you want to host 90-120 minutes of town hall or an all-hands meeting where you communicate the above answers.

Leave a little time at the end (or in between) for the team to ask questions. Don't try to be exhaustive here; you will need to communicate.

Pro Tip:

Most likely, it will be your goal that the team doesn't come to you directly anymore, but rather asks their leaders for decisions. If that's the case, make it explicit. And point out why this is positive for the team.

Individual Follow Up Meetings

Schedule follow up meetings with smaller groups of your team members to leave room for questions and follow up discussions. If you have a leadership team, join their team meetings with the team.

Don't open up the discussion about whether or not the strategy is right, but answer as many questions as you can.

Collect Sign-offs on new job descriptions

Another important step to generate commitment toward the new structure and strategic goal is to talk through (potentially changed) job descriptions with each team member.

Again, if you have a leadership team in place, they can take over the task.

Here's how it works:

- Read through the job description with the team member (one-on-one).
- Clarify any questions.
- Find out if everything is clear and unambiguous.
- Find out if they are confident that they can complete all tasks.
- Note down potential training demands. ("This is the time to raise concerns; let us know if you need help or training somewhere.")
- Have your team member literally sign off on the job description. Use physical signatures if you can meet with your team or digitally sign using an online tool. There has to be an actual act of signing a document. This will help with commitment.

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Set up a communication channel where people can raise concerns or ask questions

Change is not an event, it's a process. You'll have to communicate your strategy over and over again, in team meetings, casual conversations, and any other channel.

To have a platform for questions and concerns, we recommend opening up a channel specifically for the change and strategy initiative.

For digital companies, this could be a chat channel (Slack, Teams, or whatever else you're using). For more traditional companies, it could be a pin board or white board where people can put questions and where you meet regularly to discuss.

Give this channel the name of the initiative that you've developed earlier.

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Week 7: Implement Meetings and Review Your Communication Tools

Input:

- None

Who you'll need (Schedule in advance)

1. Your leadership team

Deliverables

- [ ] A meeting structure
- [ ] Internal communication guidelines

Why Communication matters

If you want a company to run without you, there is a central component: Communication. Great communication serves multiple purposes:

- Strategic alignment: Everyone in the company knows the direction and latest developments.
- Problem-solving: Effective communication is the vehicle for problem-solving.
- Learning organization: In order to create an organization that's able to learn, you need to make communication happen.
- Employee engagement: Good communication patterns support an engaged team.

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Set up Team and One-On-One Meetings

The first two communication tools you need to implement are the team meeting and the one-on-one meeting.

Team Meeting

The team meeting is a weekly one-hour meeting where you discuss all things related to strategy of the company, its impact on the team's work, and the team's issues that are relevant for the whole team.

If you have a leadership team, ask them to set the meeting up with their teams. If everyone reports to you, you do it.

A few best practices around team meetings:

- Rotate the responsibility for moderating throughout the team to ensure higher engagement.
- Have a place where everyone can collect agenda points.
- Have people prepare what's discussed in the meeting in writing and submit prior. Notion or Miro are great tools for this. Anything else works as well.
- Be disciplined in the meetings. Only discuss topics relevant to everyone. Everything else should be discussed in a follow-up meeting.
- Assign someone to write minutes and distribute them afterward. Focus on decisions and task; keep the informative parts to a minimum.
- What's a good time for a team meeting depends on how your workload is usually distributed over the week. Usually Tuesday, Wednesday, or Thursday works well as it leaves time to work on things discussed or to prepare.

One-on-one Meetings

The one-on-one meeting is the most underrated meeting format of all. It produces great insights, engages employees, and provides a platform for everyone to contribute to the company's success.

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The agenda should consist of a part that the manager fills, and a part that the employee can fill with topics. This will make sure you actually hear what's going on in your team's minds.

Depending on the task-related maturity as well as preferences of your employee, the duration and frequency can be customized to each individual.

- Very experienced employees might be happy to just speak once a month for 30 minutes. If their performance allows, that's fine.
- Rather new, inexperienced team members will need more facetime, e.g., an hour per week.

Pro Tip:
There are two ways of scheduling. A fixed, recurring meeting is the standard. If, however, intervals are rather extended, you should switch to rolling planning. In each meeting, use the last minute to find the next date. This prevents huge gaps in between fixed meetings when one meeting needs to be cancelled due to vacations or business trips.

Set up subject matter meetings

In addition to the above, you will also need some standing subject matter meetings. A few use cases:

- Project meetings: Discuss progress, roadblocks, and other things relevant for the project team to move forward.
- Standing cross-functional meetings: If you have functions in your organization that need to constantly communicate, but are not in the same team, a standing meeting is a good idea. Example: The supply chain and inventory team needs to discuss with sales to integrate supply chain management with projected sales figures.

The standards for planning, preparation, and running the meeting are the same as for the team meeting.

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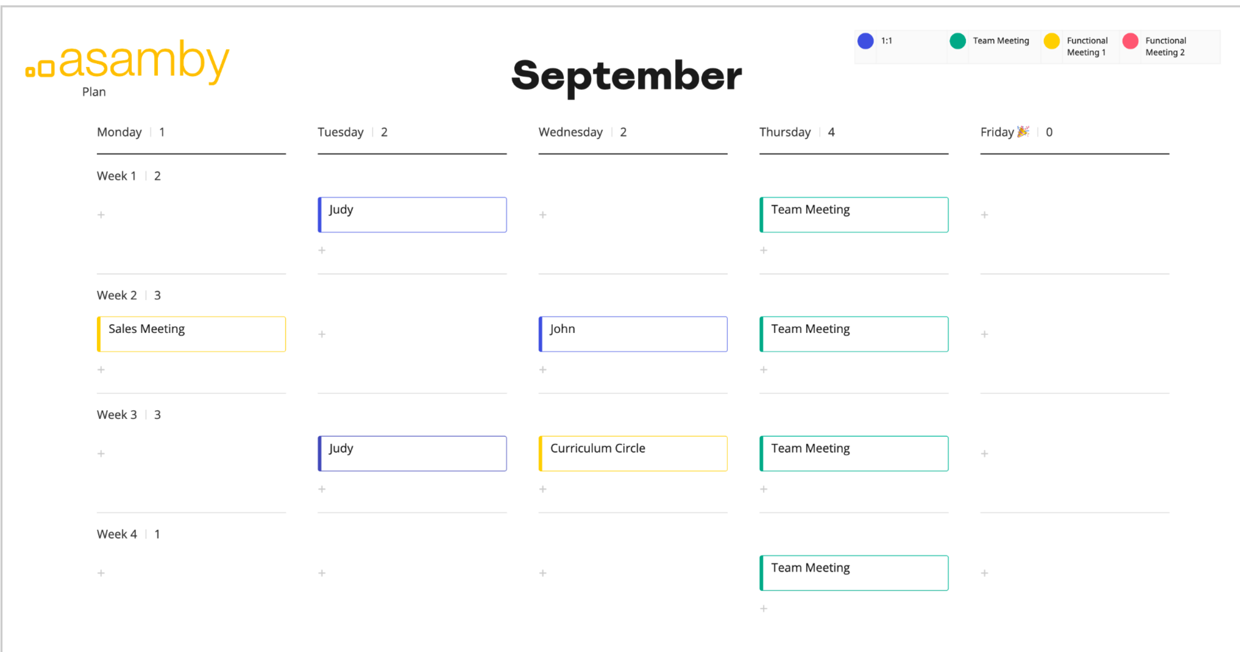
Pro Tip:

- Keep the teams in these meetings as small as possible.
- Constantly or at least regularly assess if the meeting produces a value that justifies the resources it occupies. If this is not the case, adjust participant list, duration, scope, frequency – or simply stop running the meeting.

Discuss with your leadership teams which meetings are necessary and have them set up.

You and your leadership team should develop their own **monthly meeting calendar**.



Set up guidelines for Communication tools (what goes where)

Meetings will just be one tool of many. To be effective, all communication tools should be well-aligned and used in a consistent way.

A critical point to watch out for: Communication around tasks should be searchable and findable.

An example:

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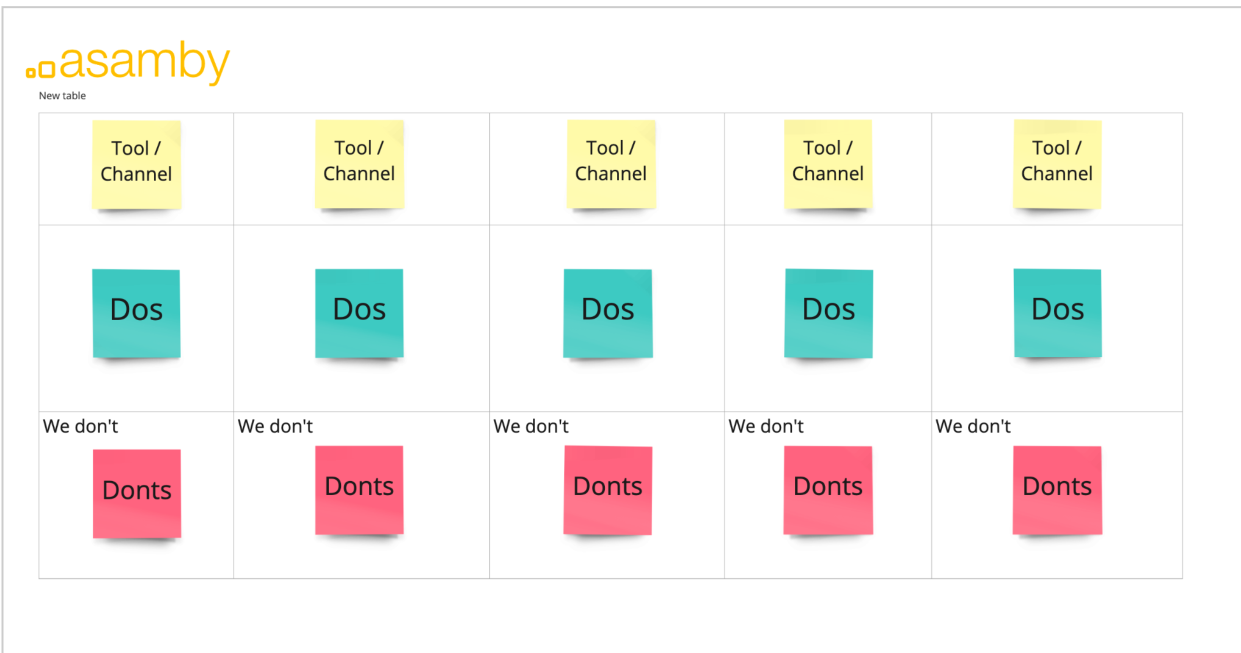
The bakery sales team just puts the contact information and preferred dates of newly-signed training clients in the company Slack channel. Communication has taken place, but now project management has to go into Slack and search for the needle in the haystack.

A better solution would be to have a structured place to submit this information.

Take an hour or two and discuss the question of what goes where with your leadership team. Map the tools that you have and then discuss which information goes where.



Once done, have the leadership team communicate this **communication map** in the next team meetings.

Leadership and Strategic Meetings

Plan your leadership team meetings. Weekly or or every two weeks for two hours is a good starting point. See if you need more or less time or frequency.

Also, don't forget to schedule and plan your strategic meetings: a quarterly meeting to review your roadmap and a yearly one to reassess strategy.

Week 8: Launch Documentation of Processes

Input:

- Value chain from Week 3: Map your Processes and find Bottlenecks

Who you'll need (Schedule in advance)

1. Your leadership team
2. Someone from your team who is a good project manager and has a good understanding of operations and the need for documentation (let's call this person the documentation manager)

Deliverables

- [ ] Project plan to implement documentation
- [ ] Tool set up to house your company SOPs

Part of creating an autonomous company is converting knowledge from human capital (things people know) into institutional capital (know-how that's available to everyone in the company).

You'll have to create documentation.

Build a Documentation inventory

First, use the value chain that you've created earlier to build a **process documentation inventory**. This can be a simple list of the processes you have (use the list that you already have from the RACI matrix).

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Add some more columns:

- Is this process documented already?
- Does it need revision?
- Who is responsible for the process? You're looking for the process owner, not for the people that are executing. The process owner will likely be someone from your leadership team.
- Lastly, add a column for priority. Define which SOPs are high, medium, and low priority.

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Process Name	Link to documentation	Next revision	Responsible	Priority
Content Creation	link	Feb 2023	Judy	MEDIUM
Source Leads	link	Needs Update	John	HIGH
Close Deals	link	August 2023	John	MEDIUM
Train the Trainer	link	November 2023	Judy	HIGH
Curriculum Design	NA	NA	Judy	HIGH
...	...	...	...	...

Pro Tip:
Don't forget to set up a vendor or contact list. Often, founders own all vendor relationships. You need to make them available in a structured form if you want your team to take over.

Assign Responsibilities and prepare

Next, go through the list together with your leadership team and your documentation manager.

Build a project Plan

Decide who will be the person responsible for writing the SOP. Also, decide on a sequence. Most likely, you will do the high-priority ones first, but there might be scenarios where you want to build out a medium or low priority SOP first.

Put the creation process into a project plan.

Pick a tool

You might not have a good tool yet to document processes in. If this is the case, you'll have to choose one. [Here's a resource that can help you pick the right tool.]

Follow SOP Best Practices

When starting the process of documenting, make sure you follow SOP best practices.

- Be aware of the use case. In most cases, this will be a mix between onboarding, quality management, and process improvement. Depending on the use case, you might use different media types more or less often (e.g., lots of video is great for onboarding but not good if your processes change often).
- Make it a group effort. In order to maintain the SOPs after creation, everybody has to use them and contribute to them. So why not start with this right away? Everyone should know that they're supposed to contribute.
- Make them easily accessible and fun to use.
- Make sure every SOP has an easily identifiable person responsible for it, so the reader can follow up on it.
- Once finished, have a solid handover to the team where you work through the SOP together and answer any questions.

Launch

Announce the start of the project to the team. Introduce the role of the documentation manager. Assign the responsibilities to the team and let them know the deadline for their tasks.

The Documentation Manager should schedule a regular check-in with the SOP writers that are currently working.

Progress of the project should be reported to you and the leadership team on a regular basis.

Be aware that this task might extend well beyond the 100 days. Ideally, create the understanding that working on documentation is never finished.

Pro Tip:
SOP writing is a time-consuming process. It might make sense to outsource this to a professional SOP writing service. We recommend the **SOP**Heroes.

Week 9: Set Up Framework for a Learning Organization

Input:

- RACI matrix and job descriptions from Week 4: Define the org-structure and empower the new leadership team

Who you'll need (Schedule in advance)

1. Your leadership team
2. Documentation Manager (that you appointed in week 8)

Deliverables

- [ ] Continuous improvement process
- [ ] Documentation First Manifesto
- [ ] Update process for documentation
- [ ] Learning and development program

If you want to remove yourself from the operations, the critical part that you're removing is not your work force or the hours that you put in, but the ability and willingness to solve problems you encounter for the first time.

Your organization needs to take over a good part of that problem-solving. Otherwise, you'll be called in again and again.

Being able to solve these problems consists of multiple components:

- A clear understanding of the overall strategy to base your decision on
- The understanding that you are allowed to make decisions
- The ability to understand the problem
- Sufficient information to make a decision

The first bullet point is addressed already. You do have a clearly defined strategy that is communicated to the team.

The last three bullet points, we will address in this chapter.

What is a learning organization?

A learning organization is an organization that has a repeatable process in place to convert human capital into structural capital. In other words, you need to consistently formalize knowledge – out of people's heads, into a format that's usable by everyone.

There are four requirements:

- Acquiring knowledge
- Storing knowledge
- Sharing knowledge
- Using knowledge

Here are a few tools to enable your organization to do that:

Establish a Continuous Improvement Process

First, you want to establish a **continuous improvement process**. Keep it simple:

- Ask each team to have a continuous improvement meeting every other week or once a month. One hour should be enough.
- Each team needs a central place (ideally your task/project management tool) to collect issues they identify during the month. It should be as easy as dumping a quick note in there.
- In the meeting, you go through the collected items. Prioritize them together with the team. Solve the ones with low effort, high impact first. Move on to higher effort, higher impact. If you ever get to the point that you've tackled all of those, pick the low effort, low impact ones.

- Assign each team member one issue to resolve until the next meeting. This could be as easy as updating a process description, or changing a template, or writing a new one.
- In the next meeting, before you assign and discuss new issues, go over the previously assigned ones to check them off or follow up.

Pro Tip:
These meetings take a few rounds to become second nature. Until then, your leadership team needs to encourage people to collect issues and hold them accountable for completion of assigned tasks. After a few rounds this will become increasingly easier and natural.

Establish a Documentation First Culture

As mentioned earlier when we talked about documentation, documentation at a point becomes increasingly important.

The outcome of the documentation efforts started in this program is an operational snapshot. It captures your processes and how you operate today.

But as you grow, these procedures need to change, new ones need to be added. Old ones need to be deleted. You'll need to enable your organization to do that, otherwise you'll have to do that.

Set up guidelines together with your Documentation Manager around a Documentation First Culture. Here are the three key components:

1. When I need information, the first place to look is our documentation.
2. If the information I need is not there, I find it somewhere else and add it afterward.
3. If I find documentation that's inaccurate or outdated, I address that.

Write these points up, add what makes them work for you, and circulate this **Documentation First Manifesto** among the teams.

1. When I need information, the first place to look is in our Company Wiki in Notion..
2. If the information I need is not there, I find it somewhere else and add it afterward.
3. If I find documentation that's inaccurate or outdated, I address that in #documenttation-first Slack channel

Your leadership team needs to support and repeat that messaging constantly.

To support that, it's a good idea to have a central contact or channel to address missing or inaccurate documentation. A Slack channel dedicated to the topic, a place in the documentation software, or a direct line to the Documentation Manager will work.

Define this **update process for documentation** together with your Documentation Manager and communicate it.

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Case	Notify Documentation Manager?	Responsible add / change Content	Approval
Small isolated changes	No	Person who identified need for change	Peer review
Larger isolated changes	Yes	Person who identified need for change	Documentation Manager
Outdated Description	Yes	Process Owner	Documentation Manager
Missing Content	Yes	Process Owner	CEO

Set up simple learning and development programs or frameworks

Assuming you're a small organization, you likely don't have the capacity to set up expansive learning environments and development programs.

But if you really want to create a powerful organization, you also can't afford not to have anything in place.

Here's a simple approach to developing your **learning and development program**:

- Take your RACI matrix and/or job description and identify the two most important skills for each role.
- For each of the skills collected, identify at least one training measure. Could be an online course, a third-party training, shadowing someone in the company that's an expert, etc. Be creative.
- Collect the training measures in one place, add the respective process descriptions.

- Add three-to-five job-unspecific but industry-related training resources that you think are useful for your industry.
- Add three-to-five methodological training resources (time management, communication, management, delegating effectively, etc.).
- Set up a generic plan that each employee needs to complete each year. Example:
    - All job-related trainings for the current position
    - At least one job-related training resource for another position, potentially one the employee is aspiring to hold in the future
    - One industry-related training resource
    - One methodological training resource
- Ask your leadership team to track completion for their department.
- Define how the leadership team or each team member can add training resources.

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Role Specific Training

Role title	Topic	Training Title	Link
Trainer	Story Telling	Story Telling for Trainers	Link
Trainer	Media Use	Finding your perfect media mix	Link
Sales	Negotiation	XYZ	LINK
Sales	Objection Handling	XYZ	LINK
...			

Industry Training

Topic	Training Title	Link
Bakeries in General	Bake your own success	Link
What drives sales in bakeries	In house resource	Link

Methodological Training

Topic	Training Title	Link
How to prepare a training	internal resource	LINK
Time Management		
Communication		
...		

Week 10: Set Up Task or Project Management

Input:

- Value Chain from Week 3: Map your Processes and find Bottlenecks

Who you'll need (Schedule in advance)

1. Your leadership team
2. Your team for training

Deliverables

- [ ] Ready-to-use project or task management software

Find a tool if you don't have one yet

If you don't have a central task management or collaboration tool, now is the time to get one. There are few equally strong players out there. Examples:

- Asana. Easy usability, has been around for quite some time. Good when your team is not too tech savvy.
- Clickup. Jack of all trades. Usability can be a bit clunky.
- Airtable. Powerful database tool. Needs tech-savvy users.
- Other tools to look at are monday.com, Trello, or Wrike.

Go with the cheapest plan first and update as needed. If you buy an expensive plan right away you'll never know if a cheaper plan would have done as well.

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Align Task Management and Collaboration tools with your core processes

The goal is to manage all core processes from your value chain (the ones at the bottom) in the task management tool.

Ideally, you'll also have everything else in there.

A few thoughts about how to set the tool up:

- If departments have to collaborate on recurring tasks that follow the same process, then board views are best.
- List views are better for more complex, one-off projects (large construction projects).
- Keep the structure as simple as possible.
- Don't go crazy with automation right away. You'll need some iterations until the structure sits right. Then you can automate.
- Use prebuilt features first, custom fields second. All of these tools have more powerful sorting, filtering, and reporting capabilities on the prebuilt features.
- Be agile: Implement a working prototype quickly, let the team work with it and expand as you go. This prevents you from cooking something up on your own that everybody hates.

Refine Setup for High-Level Insights

You want to use the reporting functionality of the tool of choice. All of the mentioned tools have customizable reporting sections.

There are two dimensions to look at when setting up reporting:

Reporting on Task progress

The most natural thing to do in a task management tool is to monitor progress of tasks.

Try to build dashboard views that give you a quick overview of the progress of your critical tasks. Make sure you don't have to deep-dive into each project or task to understand where it's at.

Feeding your KPI system

Some of the data that's tracked or produced in the task management tool might be a relevant input factor for your KPI dashboard.

You can try to extract that information manually or automate the transfer in your dashboard.

In any case, make sure you don't create a competing KPI dashboard here. Be clear about what you track in the task management dashboard and what is part of your KPI dashboard.

Train your Team

It is important to train your team on the new or changed task management. Outline the high-level structure first.

Then show them by function, how the process works and how tasks need to be tracked. In the first rounds, have everybody listen on each function so they understand the big picture.

Pro Tip:
Implementing or changing a task management tool is a process and won't be completed with one training. Rather, schedule a regular session each week for two-to-eight weeks, depending on the complexity of the implementation. Prolong as needed.
Treat these sessions more as user group meetings where you collect feedback and questions and let team members share best practices.
In addition, it's advisable to open a standing channel (chat or other) where people can address questions or make suggestions when they encounter them.

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Week 11 - 14: Trial the New Operating Model and Fine-Tune

Input:

- Your CEO target picture from [Week 4: Define the org-structure and empower the new leadership team]
- Your change communication channel from [Week 6: Communicate plan and new responsibilities to the team]

Who you'll need (Schedule in advance)

1. Your whole organization

Deliverables

- ☐ Feedback List: Insights and necessary changes to the operating model built in the past ten weeks
- ☐ Improved practices from the first ten weeks
- ☐ Town hall meeting with the whole organization

After all the designing, building, and training, it's time to test what you have built. The next four weeks are all about trying out your new operating system. And then fine-tuning it.

Move into your new position of working on the business instead of in the business

Without announcing it explicitly, move into the CEO position that you're aspiring to hold. In theory, all necessary systems to run your company smoothly should be in place now.

In real life, there will be many things that are not yet working sufficiently well.

People will likely need time to adopt new roles. Adoption of new tools will take some more time. And so on.

Important for the upcoming four weeks is to treat them as an experiment.

Do not jump in to fight fires or help out. Stay disciplined; only this way your team has a chance to prove that it can work.

Feedback List: Have a central place to document all things that are not yet working. Cluster them by priority to use the structure of this guide to collect issues.

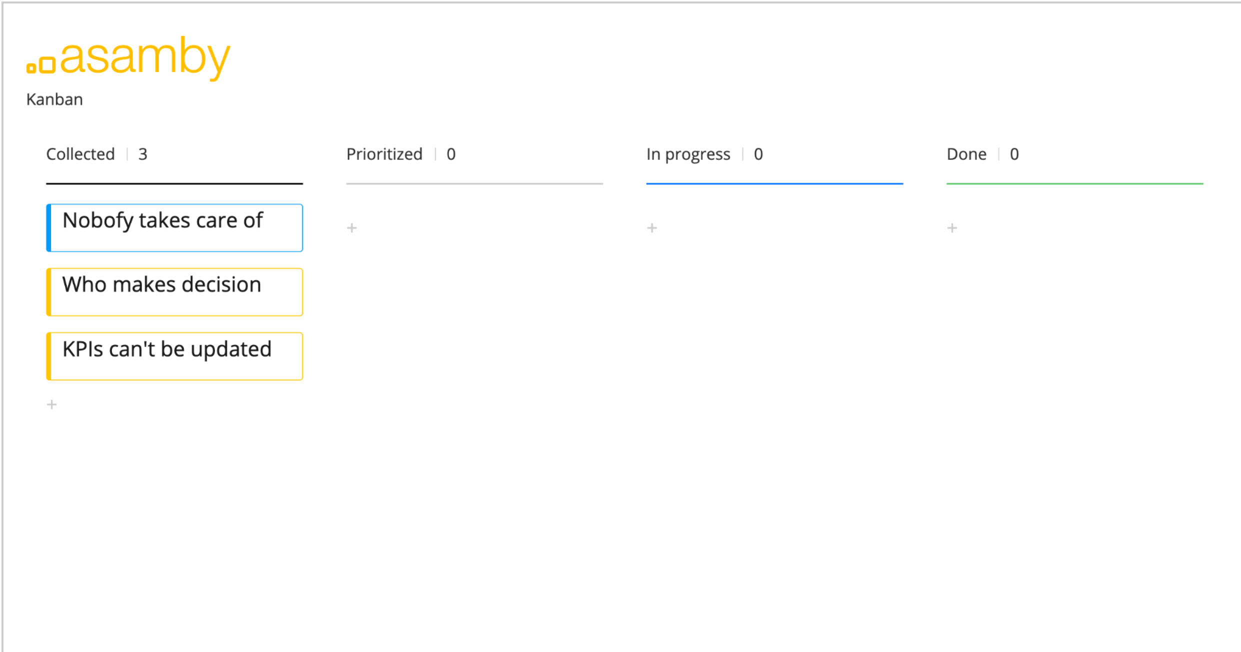
Pro Tip:
You can just reuse your continuous improvement board.

Collect Feedback

Pay close attention to the communication that happens over the change channel. This will give you lots of insights on what is not working.

Have the department heads schedule meetings with their teams at the end of the two weeks. In this meeting, they can inform the teams that you have been stepping back from operations.

Use this meeting to collect further feedback from the teams' point of view. This can also go into your **Feedback List.**



The end – last week or so – of the 100-day challenge is dedicated to improving what hasn't been working during the test run.

Assign items from feedback list to leadership team

Sit down with your leadership team and go through the feedback list. Prioritize the learnings and assign them to the leadership team members.

If there have been learnings around the documentation, then also involve the Documentation Manager.

Schedule a follow-up meeting at the end of the two weeks to go through the changes that have been made.

Plan another town hall meeting

Schedule another town hall meeting with the whole organization. The goal of this meeting is to praise the team and motivate them for the changes that you have been implementing.

In this meeting, showcase all the new things that have been implemented and how the team contributed to it:

- New org-structure and job descriptions
- New KPI-based management systems
- New meeting structure for better communication
- New documentation and documentation-first culture
- A continuous improvement process
- A learning and development plan
- New task management tools

Outline the strategic goals again and what the status of achieving it is. Highlight sub-goals that have already been achieved.

Thank the team for their contribution. Make clear that these changes and the execution of strategy will require ongoing effort.

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What's Next?

If you have completed the past 14 weeks as outlined in this e-book, you now have a pretty comprehensive management system in place.

Work in Progress

Despite having implemented everything that's necessary, you already have experienced that these new operating models are a work in progress.

For the next few months, you and the leadership team will be constantly re-assessing and fine-tuning the tools and practices developed in this guide.

If you stay consistent in doing that, the outcomes and benefits for you, the teams, and the company will be massive.

Every other week, reserve some time in your leadership meeting to monitor how the new practices are being adopted and improved.

Strategy execution

Also, your next strategy execution meeting should be coming up. It's time to review your roadmap for the next quarter.

Discipline is key

To really achieve your results, the one thing that's needed now is discipline. And it starts with you. Allow your team to learn. Allow the occasional f&%!-up as long as it isn't lethal. You have to accept the change in your role first, only then will your team follow.

Stay disciplined. And your team will follow.

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Need Help? Let's connect!

If you liked this guide, we'd be happy if you connected with **Benjamin on Linkedin**.

If you need help implementing any of the tools and systems mentioned in this e-book or just want to quickly discuss questions you have, please make sure you get in touch.

Visit us at **www.asamby.com** or schedule an appointment using the button below.

Book a Call

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