

SOS

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Simple Operating System WORKBOOK

Kick-Off Meeting **DATE**

NAME:

VISION

THE END GOAL	CORE PURPOSE
THE 3 YEAR PLAN	CORE VALUES
1. 2. 3. 4. 5.	1. 2. 3. 4. 5.

STRUCTURE

Rocks/Goals/Priorities

There will be Company Rocks that may or may not involve everyone on the team. There will also be Individual Rocks. The Company will have three Quarterly Rocks and each person will have three Monthly Rocks. The reason for three is less is more. If you have more than three, typically none will get done. When everything is important nothing is important. With increased focus on just a few rocks, you and your team members will accomplish more.

The One Year Plan

What needs to get done in the next 12 months? What has to be true for you to achieve your short-term goals? Are there any regularly occurring items you would like to have part of your company culture? What other important tasks should be accomplished that don't relate specifically to the three to five year goals but are foundational to grow your company?

Examples:

- Sales of \$1.6 million with EBITDA profit of \$200,000
- A three plus team member second shift running by 9/1
- All new CNC machining centers purchased are Haas, no exceptions

Quarterly

What needs to get done in the next 90 days? (some should relate to the 1-year plan; often involve more than 1 person)

Examples:

- Close \$500,000 of new business
- Post job openings for two 2nd shift positions and interview at least 4 people

Monthly

What can be done in the next 30 days to help us drive quarterly priorities? (at least one rock per person should relate to a Quarterly rock)

Examples

- Close \$150,000 of new business
- Write job descriptions for 2nd shift positions

STRUCTURE

ONE YEAR PLAN	
1.	
2.	
3.	
4.	
5.	

NOTES

STRUCTURE

QUARTERLY ROCKS

OWNER	ROCK	DUE DATE

NOTES

STRUCTURE

MONTHLY ROCKS			
WHO	#	ROCK	DUE DATE
ME	1		
ME	2		
ME	3		
WHO	#	ROCK	DUE DATE
	1		
	2		
	3		

STRUCTURE

MONTHLY ROCKS			
WHO	#	ROCK	DUE DATE
	1		
	2		
	3		
WHO	#	ROCK	DUE DATE
	1		
	2		
	3		

STRUCTURE

MONTHLY ROCKS			
WHO	#	ROCK	DUE DATE
ME	1		
ME	2		
ME	3		
WHO	#	ROCK	DUE DATE
	1		
	2		
	3		

STRUCTURE

MONTHLY ROCKS			
WHO	#	ROCK	DUE DATE
ME	1		
ME	2		
ME	3		
WHO	#	ROCK	DUE DATE
	1		
	2		
	3		

