

Quarterly Playbook Review Meeting



A winning team documents their best plays, practices them, and improves upon them. It is the same for your professional team. Documenting your processes is only the beginning. A strong and capable team must employ a process of improvement to keep playbooks up-to-date, relevant, and valuable. **We recommend a quarterly review meeting, following this process:**

OBSERVE:

- **Take time to analyze changes in the market or industry.** What advancements or changes have happened since the prior update?
- **Gather KPIs of the current process.** Is the process having the correct the outcome? If not, what needs to change?
- **Being disciplined to the processes.** Is the team following the steps as documented? If not, write down where it deviates.

MAP:

- **Priority Matrix** - from the list that's been gathered above. Identify the easy, small changes that are relatively easy to implement.
- **Whiteboard session** - draw a map of the entire process, from beginning to end.
- **Identify** - An easy place to begin is pointing out the areas with ambiguous hand-offs, misalignment, or the mentality "we've always done it this way." Ask the team, "Is this outdated?" "What's missing?" "Where can we simplify?"
- Ensure KPIs are **aligned**

Hint: suggested changes are best coming from those directly involved in a process

REFINE:

- Update your process playbook with the changes. This might mean updated steps, videos, documents, links, etc.
- Alert the appropriate team members of the changes.
- Implement the changes and see it through for at least 5 iterations.

Note: Subject Matter Experts should take note of where improvements happened, and where failures happened, so the updated playbook is stronger and more valuable.