The Playbook Priority Planner

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Getting Started

Trying to get your PROCESS PROJECT off the ground? Without a compelling reason for doing them, Process Projects get kicked down the road, quarter after quarter. Instead, focus first on prioritizing. Clarity creates energy and focus.

The Secret: FIND THE FIRE. The Visionary has a "pet rock" every quarter. That's the highly important project that simply MUST get done. It's like a fire. It's either a BIG PROBLEM or a BIG OPPORTUNITY. Tie into that for your first Process Project and you'll get the resources, energy, and drive from your biggest and best project driver; your Visionary. Once Process is in motion, it's easier to keep the momentum.

To help with this challenge, here is a simple tool for prioritizing your Playbooks:

1. Begin by listing out a maximum of **twelve areas of the business** that need to be Playbook'd.

2. Assign a check mark score to **each Playbook** based on the following criteria:

   - **Urgency:** Is it URGENT and Important? Or simply Important. Urgency is essential.

   - **ROI Potential:** Will there be a significant return on investment of time and energy?

   - **Visionary Priority:** does this project align with their perspective of priority?

   - **Process Documented:** Has there been *any* documentation or mapping?

   - **Subject Matter Experts (SMEs) Identified:** Do you have right person for this?

3. Add up the check marks for **each Playbook** to determine which ones have the highest scores.

4. Select the **top three Playbooks** with the highest scores and rank them in order of priority.

5. Assign a KPI (performance metric) to the three playbooks to ensure you have a measure of success.

By following this process, you can prioritize your Playbooks and tackle them in a more organized and efficient manner.

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Playbook Priority Tool

Directions

1 Define 12 **areas in your business to Playbook**

2 Score each **Playbook** against the priority criteria along the top

3 Score your grid and select the **top 3** that will have the most impact

4 Rank the top three into an order of priority

Examples	Top 12 Playbooks	Urgent?	ROI Potential?	Visionary Priority?	Process Documented	SME Identified?	
Sales	Sales	✓	✓	✓			3
Marketing	Marketing			✓	✓	✓	3
Team Onboarding	Operations	✓		✓		✓	3
Client Onboarding	Finance				✓	✓	2
Customer Service	Facility				✓	✓	2
Supply Chain	Team Onboarding	✓	✓	✓		✓	4
Human Resources	Client Onboard'g	✓	✓	✓		✓	4
Accounting	Offboarding					✓	1
M&A	Information Tech				✓	✓	2
Administration	Customer Support	✓	✓	✓	✓	✓	5
Event Management	Administration				✓	✓	2
Assembly	Purchasing				✓		1
Technology							
Manufacturing							
Procurement							
Processing							

Top 3 Playbooks

HR Onboarding	Warehouse	Customer Support

Metric to Measure It

Speed: 6 weeks	Pick: 200hr	Net Promoter: 86+

2	3	1

Order of Priority

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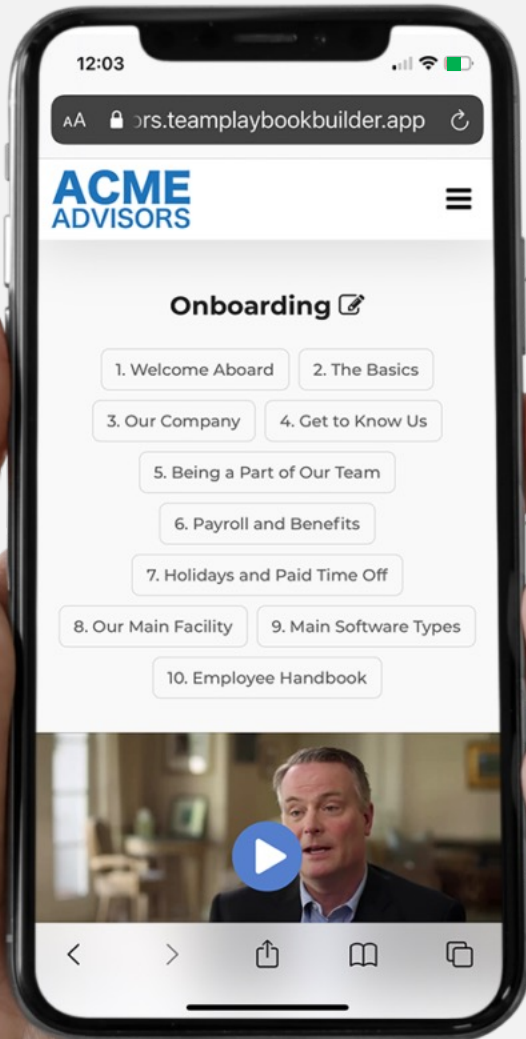**4** Rank the top three into an order of priority

Top 12 Playbooks	Urgent?	ROI Potential?	Visionary Priority?	Process Documented	SME Identified?	
Examples						
Sales						
Marketing						
Team Onboarding						
Client Onboarding						
Customer Service						
Supply Chain						
Human Resources						
Accounting						
M&A						
Administration						
Event Management						
Assembly						
Technology						
Manufacturing						
Procurement						
Processing						

Top 3 Playbooks

Metric to Measure It

Order of Priority

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Onboarding

1. Welcome Aboard
2. The Basics
3. Our Company
4. Get to Know Us
5. Being a Part of Our Team
6. Payroll and Benefits
7. Holidays and Paid Time Off
8. Our Main Facility
9. Main Software Types
10. Employee Handbook

ACME ADVISORS

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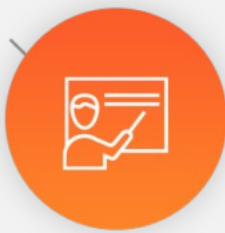
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