

Playbook Your Business

The Playbook Priority Planner



playbook
BUILDER™



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.



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

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	Sales	✓	✓	✓			3
	Marketing			✓	✓	✓	3
	Operations	✓		✓		✓	3
	Finance				✓	✓	2
	Facility				✓	✓	2
	Team Onboarding	✓	✓	✓		✓	4
	Client Onboard'g	✓	✓	✓		✓	4
	Offboarding					✓	1
	Information Tech				✓	✓	2
	Customer Support	✓	✓	✓	✓	✓	5
	Administration				✓	✓	2
	Purchasing				✓		1

Top 3 Playbooks

HR Onboarding	Warehouse	Customer Support
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

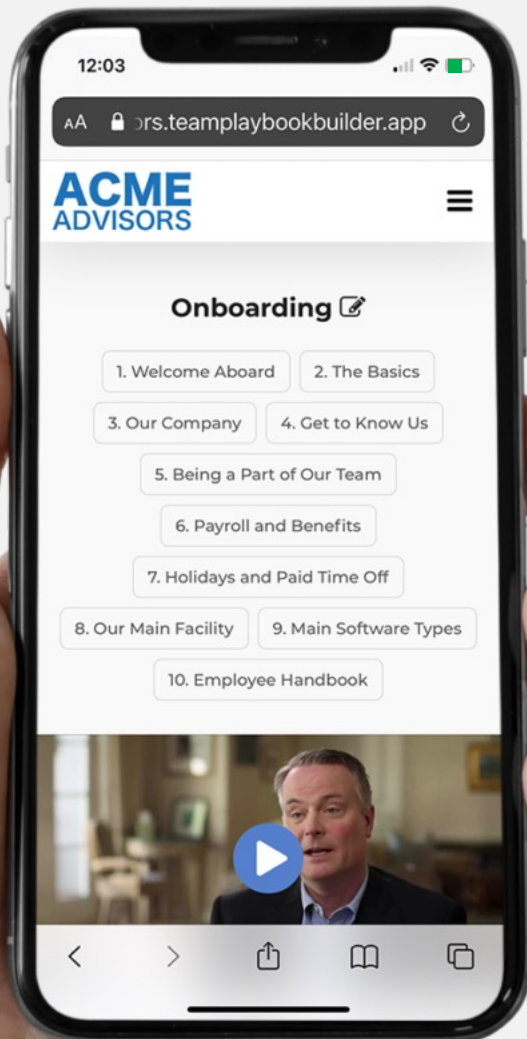
	Top 12 Playbooks	Urgent?	ROI Potential?	Visionary Priority?	Process Documented	SME Identified?	
Examples							
Sales							
Marketing							
Team Onboarding							
Client Onboarding							
Customer Service							
Supply Chain							
Human Resources							
Accounting							
M&A							
Administration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

Top 3 Playbooks

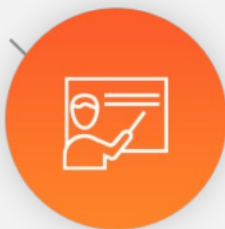
Metric to Measure It

Order of Priority





Click here to learn more!



PlaybookBuilder is a cloud-based knowledge management platform that houses all the processes, tools, training, and best practices of an organization, so it can move fast but keep everyone connected and updated. www.playbookbuilder.com