

● Why we exist

One sentence the whole team can repeat. It should help you decide which work and which customers to say no to.

● Three years from now

Four or five lines: size, shape, the team, and what your own week looks like. Specific enough to know when you've arrived.

● This year's targets

No more than four. Each readable from the accounts or a timesheet, with today's figure beside it.

Target	Today	By year end

● This quarter's three priorities

A piece of work that finishes, not a department's day job. One named owner each, never "the team", and a date.

Priority	Owner	Done by
1		
2		
3		

● The owner's role this year

The line most plans leave out. Be as specific about what stops as about what stays.

I keep	I stop

● How we'll run it

When the plan gets looked at, and by whom.

Weekly huddle

45 min · when

Monthly numbers

2 hours · when

Quarterly reset

1 day · dates

Annual plan

2 days · month