

CHECKLIST FOR THE CEO

CEOs can print out and use this checklist to ensure that their operating reviews are as successful as possible.

- We have developed our aspirations (mission, vision, values) and strategic goals, and are now ready to rigorously execute them while iterating on them over time.
- I understand that the main function of quarterly operating reviews is to help identify goals and opportunities for each operating unit.
- I am committed to holding the meetings on a quarterly basis and reviewing the pre-meeting materials submitted by each unit head.
- I have developed and/or approved KPIs and dashboards for each unit and have made sure that each unit head understands my expectations regarding pre-meeting preparation, materials to be covered in the actual meeting, and receptiveness to input and new ideas during the meeting.
- I will review draft presentations, helping each unit head pinpoint better approaches for unit assessment, as well as identifying specific strengths, weaknesses, and opportunities.
- We have crafted our meeting architecture so that it matches where we are in terms of size and maturity, and we understand that as we grow in sophistication, the meetings will become more sophisticated as well.
- I have explained to all unit heads that when they sit in on another unit head's review, they must communicate honestly and offer their best ideas; all other ground rules are also understood.
- We will have external advisors present to offer fresh perspectives, which will help us grow. In addition, I will bring new practices and people to the attention of the unit heads to help their units function better.
- All goals that are identified for future quarters will be aligned with our long-term goals.
- I am prepared to discuss and approve any additional resources identified in quarterly operating reviews that are necessary to meet our highest priority goals.
- We have assigned and trained a facilitator to ensure that this practice stays front and center, and to follow up on any action items.
- I will work with the facilitator on post-meeting assessments and with the operating heads to incorporate feedback.
- I see the value of quarterly operating reviews and am committed to working diligently to make them more valuable over time.