THE CLOCKWORK ASSESSMENT ROADMAP
THE 3 THINGS

1. PEOPLE
The best processes, systems, and tools can’t solve a people problem. We must intentionally focus on developing our team members, giving them the resources and guidance they need to trust themselves to make the best decisions for the company, without us. We’ll focus on the people-side of operations as part of Clockwork approach.

2. PROCESS
You can hire the best team members in the world, but if you don’t have any structure, systems, processes, or tools for them to work with, it will be very difficult for them to do their best. We’ll focus on improving the process side of your business as part of our Clockwork approach.

3. CLOCKWORK
Designing a business and a team that runs itself... even while you’re on vacation is part of the Clockwork approach. We’ll integrate both the people + process side of your operation to help you achieve the ultimate Clockwork status: 4 week vacation... while your business grows at home.
# The Clockwork Assessment

<table>
<thead>
<tr>
<th>The Wild West</th>
<th>The Clockwork Company</th>
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</thead>
<tbody>
<tr>
<td><strong>HIGH PEOPLE</strong></td>
<td><strong>HIGH PEOPLE</strong></td>
</tr>
<tr>
<td><strong>LOW PROCESS</strong></td>
<td><strong>HIGH PROCESS</strong></td>
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<tr>
<td>You’ve got a great team, but it’s hard for them to shine because your processes are wild + inconsistent.</td>
<td>You’ve designed a business that runs itself, time for your 4 week vacation!</td>
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<tr>
<th>The Firefight</th>
<th>The Micromanager</th>
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<td><strong>LOW PEOPLE</strong></td>
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<tr>
<td>Every day is spent putting out fires, you have trouble finding time for the most important work.</td>
<td>You have SOP’s, but they’re rarely followed + the team struggles to take initiative or make decisions on their own.</td>
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[RunLikeClockwork.com](http://RunLikeClockwork.com)
CLEAR + SHARED VISION
To strengthen the company, you must get everyone in your organizations 100% on the same page with where you’re going + what the plan is to get there — this is your vision.

I have a clear vision of where our organization is going + what the plan is to get there.

I have shared this vision with our entire organization + it’s clear to them how they play a role in the plan to get there.

ANALYZE YOUR TIME
Track your time so that you can fully understand your current 4D Mix — this is like a scavenger hunt where you’ll be able to find all the inefficiencies inside your current organization + start moving things in the right direction for everyone on the team.

Our company has completed our active time tracking for 5 days.
We have used the 4D mix calculator to analyze our current mix.

We have turned the dial towards our Ideal 4D Mix by at least 30 minutes each day this week.

**3. IDENTIFY YOUR QBR**

Bees are the most efficient system on the planet, so let's take a page from their book and figure out what companies Queen Bee Role is so that you + your team can then protect + serve it.

Our team is clear on our company QBR.

Everyone on our team is clear on how their role best serves the company’s QBR.
CLOCKWORK PEOPLE

4. PROTECT THE QBR
To strengthen + grow the company, everyone must know how to protect + serve the QBR. This is all about understanding what everyone’s primary focus is, and how they need to protect their own time, and everyone else’s to serve it.

Everyone on our team has completed the hub + spoke exercise for their individual roles.

5. BALANCE YOUR TEAM
Everyone on the team has trimmed, transferred, and trashed at least 2 hours of tasks this week from their hub + spoke to better protect their QBR.

It’s time to take everything from above and start balancing the team so that we have the right people in the right roles collectively serving + protecting the QBR.

I have completed the job trait analysis for our team / roles.

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We’ve adjusted each team members’ role based on our QBR and job trait analysis.

We’ve mapped out our current organizational chart and individual QBR’s, responsibilities, and service to company QBR are clear for each team role.

We’ve identified a growth trajectory for each individual team member. *how do you see them growing + advancing within your company or beyond?*

We know who our next 3 hires need to be, what we’re looking for, and when we’d need to hire them.

Once you’ve completed all of the above + checked all the blank boxes -- you are ready to move onto the advanced Clockwork roadmap!
CLOCKWORK PROCESS

CAPTURE SYSTEMS
Have team members capture processes + systems in their own respective roles. Start by having each team member capture 1 process per week in their respective areas. {pages 107-109}.

I now have each team member capturing at least 1 process per week in their respective areas.

CULTURE OF EFFICIENCY
Work to create a culture in which everyone is always improving the efficiency of processes + systems without being asked or having to ask for permission {continuous improvement}.

My team members now improve processes on their own without needing to ask for approval/permission.

We have created decision-making tools so that team members can make decisions that are right for the company without needing approval/reviews.
BUSINESS TOOLS AUDIT

Do a tool clean up -- make sure that each tool you’re using with your team has a specific + intended purpose that it’s being used for + ensure there aren’t multiple tools being used for the same purpose.

Example: we use Slack for communicating amongst our team, which means we DON’T also send emails to team members. Also, we use Asana for our project management system, which means we DO NOT assign tasks to team members via Slack, + definitely not via email.

Every tool we use for the business is being utilized for a specific + intended purpose.

We have ditched tools we’re no longer using or tools that had overlap with others.

Every tool has a clear purpose + that purpose has been documented as an S.O.P. + shared with the entire team.
CLOCKWORK PROCESS

KEY METRICS

4. Identify the 3-5 most important metrics you need to be monitoring on a weekly basis to understand the health + direction of the business, at a glance. Monitor these weekly + use them to make business-decisions.

I have identified the 3-5 most important metrics needed to understand the overall health + direction of our business.

5. We track + monitor these 3-5 metrics weekly + use them to make key business decisions.

SCOREBOARDS

Create a main scoreboard including key metrics, key indicators, ‘on target’ benchmarks, + assigned owners. Use budgeting + financial forecasting to stay on track with your goals. Give team members ownership - make sure everyone is responsible for owning, tracking, + monitoring at least one metric.

We have a main company scoreboard + everyone knows what metrics they are responsible for reporting out to it.

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CLOCKWORK PROCESS

We use budgeting + future financial forecasting to stay on track monthly + quarterly with our goals.

We’ve given team members more ownership + they all have at least one metric they own + keep on track with company goals.

Once you’ve completed all of the above + checked all the blank boxes -- you are ready to move onto the advanced Clockwork roadmap!

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CLOCKWORK DASHBOARD
Getting everything aligned + visible is how you move the entire company towards your vision, even while you’re on vacation. Complete the Run Like Clockwork dashboard + make sure your team can see it + knows how to use it!

I have completed the Run Like Clockwork dashboard for my business.

Our Run Like Clockwork dashboard has been shared with the team + is visible for them to see.

We use our Run Like Clockwork dashboard weekly to set goals + make sure we’re on track.

ACDC BOTTLENECK
Doing this bottleneck assessment will help you identify where you need to focus all goals, projects + resources. Most entrepreneurs are trying to solve the wrong problem, or trying to solve too many at once. The ACDC is the solution to that, at any stage of business.

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1. I have identified my current ACDC bottleneck.

2. We have brainstormed solutions and we’re clear on our next steps to solving our ACDC bottleneck.

3. We’ve used our ACDC Bottleneck to set quarterly, monthly, weekly + daily goals and priorities for the company + the team.

3. VISIBLE SYSTEMS

Visibility + transparency is key for running like Clockwork. Set up visible + transparent workflows + project management systems -- so that everyone knows what everyone else is working on at any point in time, no more guessing.

All of our projects, goals, workflows + tasks are visible to our entire team. Responsible parties, project status, and prioritization is all visible + clear.

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We have regular check-ins to make sure everyone knows how to prioritize and most efficiently move through projects + tasks.

LET GO + LEAD EFFECTIVELY

Letting go is hard to do, but it’s the number one thing that keeps business owners strapped to their day-to-day operation. So, it’s time to outsource some ownership, put your ego in the backseat, and start building up + trusting the team.

We’ve assigned each team member with a mentor + they meet with them regularly for development.

We run efficient + regularly scheduled meetings that have a specific purpose (try cutting meeting times in half as most of the time meetings are scheduled for much longer than necessary).

I make time each week to do a weekly Owners Report + I make improvements each week based upon my reflections.

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