Setting Quarterly Rocks – The Most Important Priorities



After years of testing multiple ways to approach setting Rocks (Quarterly Projects), and Milestones necessary to complete the Rocks, we have found that using the OKR framework from the book *Measure What Matters*, by John Doerr, yields the best results. If you are familiar with the book or the concept of OKR's, please note that we are not recommending fully following the OKR system, but rather, using the context and general framework. In essence, the Objectives in OKRs will be what we call the Rocks, and the Key Results will be what we call Milestones. This both improves, and simplifies, goal setting and execution.

For how to write Rocks using this framework, the formula is simple: Rocks are the most important things that need to be accomplished in the next +/- 90 days, with clear definitions of successful completion, and Milestones are the time-bound and measurable activities or smaller projects and tasks inside of each Rock.

The worksheet on the following page is a simple and effective tool for clarifying Rocks (some of our clients prefer to call them Quarterly Priorities or Projects). Your Guide will walk you through the process in each of your meetings going forward, which will help you be able to teach it to others in the organization as you begin to delegate Rocks in the future.

Defining the Rock:

You should come up with one clear sentence to define the Rock that answers the following question:

- What do you want to accomplish in one clear sentence, and how will you know it is successfully done?

Key to Mastery: There is Rock completion, and there is successful Rock completion. For example, there could be a Rock for the quarter to "Onboard at least two new clients." This could absolutely get done and be insufficient based on the organization's critical needs for growth. Successfully done might look like, "...with at least $50,000 in recognized revenue contribution."

Defining the Milestones:

Once you have filled in the first box in the form and created the Rock, it's time to clarify the Milestones. Each Milestone should clearly state each of the major steps that must get done to accomplish the Rock, as well as who owns the Milestone, when they need to start on it, and most importantly, when it needs to be done.

These Milestones do not have to be owned by the same person who owns the Rock. It is fine to delegate Milestones to others in the organization, and if those individuals are users in the software, they will have visibility into any Milestones assigned to them. Either way, it is critical to document and communicate any Milestones you are delegating to others.

You can set as many Milestones as you feel necessary to accomplish the Rock. As a general rule of thumb, we find that most of our clients set anywhere from three to seven Milestones per Rock.

Watch this short video explaining the concept of Rocks and the importance of effective prioritization.

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Rock Setting Worksheet



NEXT LEVEL GROWTH®

Rock Owner: | **Due Date:**

Use the contents of the box below to create the wording of the Rock you enter in the software.

State the Rock:
A well defined Rock will clearly state what you want to accomplish, in one clear sentence, including ***how you will know it is successfully done****?*

Milestones: What must get done to achieve the Rock?

	WHO	DUE BY
Milestone		
Milestone		
Milestone		
Milestone		
Milestone		
Milestone		
Milestone		

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ALL ABOUT
Next Level Growth

› QUESTION

What is Your **Next Level?**



Do you have a vision to multiply revenue, secure investment, exit your business, scale your social impact, or build a legacy? I'll help you articulate your vision and get there faster than you ever thought possible.

Together, we'll analyze your situation, plan your strategy, then kick off the journey with two or three days of Base Camp to work with your leadership team to implement a custom business operating system based on the Next Level Growth Approach. We'll follow this up with quarterly and annual strategic meetings to continue leveling up, until we reach your summit.

› INSIGHT

Every Organization Already Has an **Operating System.**

Yours is perfectly designed to get the results you're getting.

Most organizations operate on a system that has developed organically and often haphazardly over time. It's full of inefficiencies that result from unclear roles, responsibilities, and processes. It often lacks the galvanizing force that comes from a compelling vision, mission, and meaningful values. And almost always, it lacks the power of a winning strategy set up to create a truly elite organization.

What got you here, won't get you to the summit!

To reach your Next Level, and eventually the summit of your business mountain, you will need an operating system built on proven principles, custom-configured for your organization.

› CONCLUSION

It's Time for an Upgrade.

FIRST STEP

Take the Elite Organizations Assessment and in just 7 minutes, you'll get a customized report based on your answers that is filled with resources to help you get immediate value.

NextLevelGrowth.com/Assessment

"Inspiration is perishable...act on it quickly."

Naval Ravikant