

How to Turn Around a Struggling Department With a 90-Day-Framework

 *Create a 90-day blueprint to turn around a struggling department with actionable steps and measurable goals.*

This tutorial will teach you how to turn around a struggling team in your company using a customized 90-day plan.

Most department turnaround plans fail for three reasons:

- They focus on vague goals instead of specific, measurable metrics
- They ignore skill gaps and misalignment between team capabilities and objectives
- They lack real accountability systems to track and enforce progress

This tutorial presents a different approach: a metrics-first framework that has helped turn around departments in companies in just 90 days. Unlike traditional change management approaches that start with reorganization, this framework begins by establishing clear performance baselines and building accountability systems that make success virtually inevitable.

You'll learn how to:

- Build data-driven performance baselines that reveal exactly where your department is falling short
- Create skills matrices that expose hidden talent and critical capability gaps
- Design accountability systems that make progress automatic and measurable
- Implement organizational structures that align with your metrics, not just hierarchies
- Set up automated tracking dashboards that catch problems before they derail progress

What You'll Need:

- Access to your department's performance data
- Google Sheets for tracking metrics
- A project management tool like [Monday.com](https://monday.com)
- 2-3 hours per week for implementation

Who This Is For:

- Department heads facing pressure to improve results
- New managers inheriting underperforming teams
- Leaders tasked with post-merger integration
- Anyone responsible for turning around a struggling department

What Makes This Framework Different: Unlike traditional turnaround approaches that rely on gut feelings and reorganization charts, this framework is built on three core principles:

1. Measure before you manage
2. Skills drive success
3. Accountability creates inevitability

Ready to transform your department? Let's start with the most crucial step: establishing your baseline metrics.

Phase 1: Establish a department performance baseline using 5 key metrics

The first step to creating this 90-day framework is to establish the department's performance baseline.

Think of this as a more structured way of saying: *"Here's the team's current status."*

This baseline shows the department's current performance levels, setting the benchmark your team must exceed in 90 days.

Establishing a department performance baseline involves two components: 1) the metrics, which are the key performance areas, and 2) the quantifiable performance levels within each metric.

Here's an example of a marketing team's department performance baseline:

(Monthly Average) Department Performance Baseline

Metric #1: Sales Revenue per Channel

Social Media: \$2,820

Email Marketing: \$2,140

Paid Ads: \$4,500

Organic Search (SEO): \$1,050

Metric #2: New Product Sales & Product Launch Conversion Rate

New Product Units Sold: 70 units

Product Launch Conversion Rate: 1.5%

Metric #3: Customer Acquisition Growth Rate

New Customers Acquired This Period: 160 customers

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

Total Social Media Interactions: 6,800 actions

Social Media CTR: 1.2%

Email Campaign CTR: 1.0%

Metric #5: Marketing-Driven Revenue & Marketing Spend

Total Revenue from Marketing Campaigns: \$23,000

Total Marketing Spend: \$7,500

Let's create your department's performance baseline.

5 Steps to Identifying your department's key metrics

Let's identify the key metrics to track your struggling team's performance.

The more metrics you can track, the better, as you'll have more data and insights.

Including too many metrics has a downside: it stretches resources too thin, causing slower results. It's not ideal for a 3-month department turnaround.

We'll only choose 5 metrics to create a department performance baseline.

Each KPI should:

- Be measurable and specific
- Align with the department's goals
- Reflect the department's core functions
- Enable benchmarking and comparisons

We can identify these metrics through two approaches:

1. **Manual Identification:** Personally analyzing the department's goals, key activities, and available performance data to determine the metrics.
2. **AI-Driven Identification:** Using AI to generate key metrics by inputting the department's name, core functions, objectives, and relevant data.

You need the following information to generate the relevant metrics for your department:

- Department goals
- Team's core activities
- Department strengths and weaknesses

Let's proceed step-by-step.

Step 1: Define the department's general goals

Write the key goals and objectives of your department. This step will help confirm whether the metrics you choose later align with the department's goals.

Example:

These are the primary goals of our marketing team:

- Acquire new customers
- Increase sales revenue
- Drive product launch success
- Enhance website and social media engagement
- Optimize marketing spend

Important: As you go through the tutorial, keep all the data you create or generate with the AI in one document. That way, it'll be easy to find and reuse for later steps!

Step 2: Outline the department's core activities

To outline your department's core activities, use historical data, interview members, observe workflows, and review performance reports.

Example:

These are the core responsibilities of our marketing team:

- Develop and execute targeted digital advertising campaigns across key channels
- Create and publish engaging social media content to boost interactions and drive traffic
- Manage email marketing campaigns to support new product sales and enhance customer retention
- Optimize website and product pages to reduce bounce rates and increase conversions
- Track and analyze channel-specific sales revenue and campaign-driven revenue
- Collaborate closely with sales teams to align on product launch goals and customer acquisition strategies
- Conduct market research to refine product positioning and better target potential customers for acquisition.

Tip: See how your department's responsibilities stack up against industry standards! Add in top practices and performance goals from similar organizations to boost your metrics.

Step 3: Assess the current strengths and weaknesses of your department

To turn around a struggling department, you want to amplify (or maintain) its strengths and address its weaknesses.

Put your team's strengths and weaknesses in writing for easier visualization.

Example:

Strengths:

- Strong campaign execution across digital channels
- Consistent sales revenue from paid ads
- High-quality content creation for emails and websites
- Effective collaboration with sales and product teams
- Growing brand awareness and market recognition

Weaknesses:

- Infrequent social media posting, limiting engagement
- High website bounce rates, impacting conversions
- Poor customer acquisition strategies, limiting new customer growth
- Communication gaps between marketing and other teams
- Inconsistent use of data analytics for optimization

Step 4: Generate actionable metrics

Now, based on your department's goals, core activities, strengths, and weaknesses, generate actionable metrics to track your team's performance.

You can analyze the gathered information using logic and data-driven insights to decide on metrics for the department's performance.

Alternatively, you may ask Claude to generate these metrics using the information you've gathered so far.

Sample prompt:

I am working on defining performance metrics for my struggling [Name of Department]. Here are the details about my team:

Primary Goals of the Team:

[Insert primary goals here]

Core Activities of the Team:

[Insert core activities here]

Strengths:

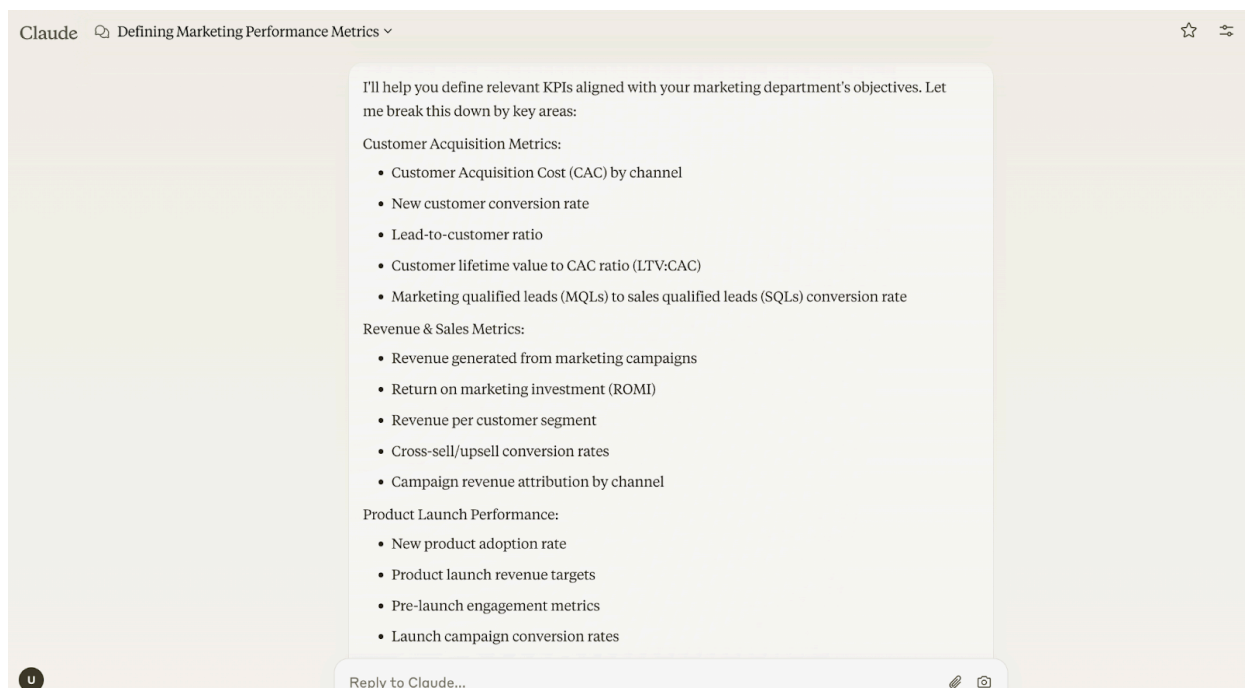
[Insert strengths here]

Weaknesses:

[Insert weaknesses here]

Based on this information, please suggest potential KPIs or metrics that could be used to create a performance baseline for this department. The metrics should be aligned with the team's goals and core activities, and should address current strengths and weaknesses. Additionally, the metrics should be measurable, actionable, and realistic for tracking performance and driving improvements. Only metrics, not data points. We'll cover the data points later.

Claude's response example:



Step 5: Choose 5 metrics and review their relevance

After identifying metrics on your own or with AI, choose the 5 most relevant metrics for your goals during this 90-day department turnaround.

Review these metrics to ensure they align with the core tasks, responsibilities, goals, and current weaknesses of the team.

Here's a quick checklist to confirm whether each metric is suitable:

- The metrics are measurable
- Every metric ties back to at least one core activity
- The metrics address the weaknesses of the department
- These metrics reflect industry standards and benchmarks

Tip: Get input from other stakeholders on your chosen metrics. Their feedback can bring fresh perspectives and help ensure everything aligns with the organization's bigger goals.

Example:

5 Metrics to Measure The Marketing Department's Performance

Metric #1: Sales Revenue per Channel

Metric #2: New Product Sales & Product Launch Conversion Rate

Metric #3: Customer Acquisition Growth Rate

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

Metric #5: Marketing-Driven Revenue & Marketing Spend

Break down each metric into measurable data points

Once you have the 5 metrics, break them down into data points that support each metric's objectives.

For example, for a marketing department's "Sales per Channel" metric, the data points could include social media, email marketing, and paid ads sales. Sometimes, the metric's name indicates the data points.

The data points for the "Customer Retention Rate & Repeat Purchase Rate" metric are the *customer retention rate* and the *repeat purchase rate*.

Just ask yourself the question:

"What data can I measure to evaluate the team's performance on [metric name]?"

Your answer will lead you to your data points.

Example:

5 Metrics to Measure The Marketing Department's Performance

(With Data Points per Metric)

Metric #1: Sales Revenue per Channel

Social Media:

Email Marketing:

Paid Ads:

Organic Search (SEO):

Metric #2: New Product Sales & Product Launch Conversion Rate

New Product Units Sold:

Product Launch Conversion Rate:

Metric #3: Customer Acquisition Growth Rate

New Customers Acquired This Period:

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

Total Social Media Interactions:

Social Media CTR:

Email Campaign CTR:

Metric #5: Marketing-Driven Revenue & Marketing Spend

Total Revenue from Marketing Campaigns:

Total Marketing Spend:

Create your department performance baseline

Take note of where you can collect the data values for each of the team's metric data points.

Once you know exactly where to gather the values of these data points, follow the steps below to calculate an accurate representation of your department's performance baseline for each metric.

Follow these steps for each data point:

1. Collect each data point's monthly data from the past 3 to 6 months
2. Calculate the average monthly value for each data point.
3. Plot the calculated values into your department's performance baseline.

By the end of this step, you should have average data point values that accurately reflect your team's current performance levels.

These values will provide a clear baseline for your department's monthly performance moving forward.

Example:

(Monthly Average) Department Performance Baseline

Metric #1: Sales Revenue per Channel

Social Media: \$2,820

Email Marketing: \$2,140

Paid Ads: \$4,500

Organic Search (SEO): \$1,050

Metric #2: New Product Sales & Product Launch Conversion Rate

New Product Units Sold: 70 units

Product Launch Conversion Rate: 1.5%

Metric #3: Customer Acquisition Growth Rate

New Customers Acquired This Period: 160 customers

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

Total Social Media Interactions: 6,800 actions

Social Media CTR: 1.2%

Email Campaign CTR: 1.0%

Metric #5: Marketing-Driven Revenue & Marketing Spend

Total Revenue from Marketing Campaigns: \$23,000

Total Marketing Spend: \$7,500

Phase 2: Build a skills matrix to identify gaps and strengths in your current team

After establishing a performance baseline for your department, it’s time to determine whether the team’s workforce actually has the necessary skills and expertise to improve the values of these metrics.

That’s where a skills matrix comes in.

A skills matrix is a chart that shows each team member's strengths and weaknesses in relation to the skills needed to achieve the five key metrics identified earlier.

For each skill, each member is graded on a scale of 1 to 4 (or A to D) by managers, stakeholders, teammates, or themselves.

A properly constructed skills matrix will help identify the best-suited team members for specific tasks, metrics, or projects and highlight areas where skill levels are notably low across the team. These insights are crucial for reorganizing the department's team structure (which we'll do later) and improving the team’s overall performance.

Here’s an example of a skills matrix:

Skills Matrix												
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	A	B	C	D	E	F	G	H	I	J	K	L
1	SKILLS MATRIX											
2			Advanced Competency	4	Intermediate Competency	3	General Competency	2	No/Low Competency	1		
3												
4	Metric		Sales Revenue per Channel		New Product Sales & Product Launch Conversion Rate		Customer Acquisition Growth Rate		Social Media Engagement Actions & Click-Through Rate (CTR)		Marketing-Driven Revenue & Marketing Spend	
5	Name	Position	Multi-Channel Analytics Proficiency	Advanced A/B Testing & Conversion Rate Optimization (CRO)	Marketing Automation & Sales Funnel Engineering	Product Story Development & Content Strategy	Growth Channel Experimentation	Campaign Copywriting & Value Proposition Design	Social Media Content Performance Analysis	Social Media Conversion Copywriting	Marketing Mix Modeling	Marketing Attribution Analysis
6	Sarah Mitchell	Marketing Manager	4	3	3	3	3	3	2	2	3	4
7	James Carter	Creative Designer	2	2	2	2	2	4	3	4	1	2
8	Emily Richards	Email Marketing Specialist	2	3	4	2	2	3	1	2	2	2
9	Michael Anderson	Content Strategist	2	1	2	4	2	4	2	3	1	1
10	Olivia Johnson	Social Media Coordinator	2	2	1	3	2	2	4	4	2	1
11	David Lee	Marketing Coordinator	3	2	3	2	4	3	3	2	2	2
12												

Let’s walk through how we can use your department's performance baseline to build a skills matrix similar to the one above.

Step 1: Define 2 essential skills for achieving each key metric

Review the 5 metrics you’ve identified earlier and define two crucial hard skills that a team member should equip in order to improve performance in this specific metric.

For example, for one of the metrics used earlier, “Social Media Engagement Actions & Click-Through Rate (CTR),” the two hard skills chosen might be social media content performance analysis and social media conversion copywriting.

Note: Different companies or departments might pick different skill sets for the same metric. After all, each one often needs a mix of strategies and skills. Just make sure the skills you choose match your focus on improving the data points for your metrics.

You can define hard skills yourself or use Claude to make the process easier. If you want to use AI for this step, just use the prompt below.

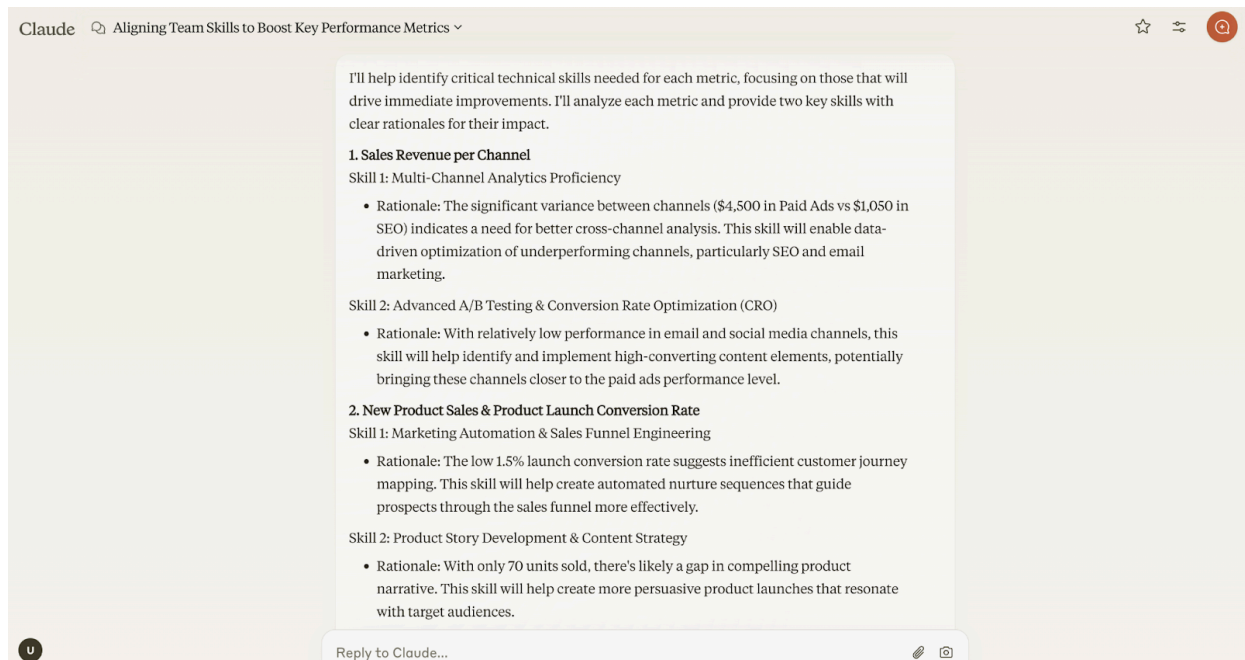
Sample prompt:

I am revitalizing a struggling department within my company by aligning team skills with specific performance objectives. To achieve this, I have identified five key performance metrics, each with distinct improvement targets. I need your assistance in identifying two critical technical skills necessary to enhance each metric. Please prioritize skills that will have the most immediate impact in driving measurable improvements and include a brief rationale explaining how each skill will contribute to achieving the targeted outcomes.

Here is the department's current performance baseline:

[Insert Department Performance Baseline]

Claude’s response example:



The screenshot shows a chat window with the title "Claude" and a subtitle "Aligning Team Skills to Boost Key Performance Metrics". The chat content is as follows:

I'll help identify critical technical skills needed for each metric, focusing on those that will drive immediate improvements. I'll analyze each metric and provide two key skills with clear rationales for their impact.

1. Sales Revenue per Channel

Skill 1: Multi-Channel Analytics Proficiency

- Rationale: The significant variance between channels (\$4,500 in Paid Ads vs \$1,050 in SEO) indicates a need for better cross-channel analysis. This skill will enable data-driven optimization of underperforming channels, particularly SEO and email marketing.

Skill 2: Advanced A/B Testing & Conversion Rate Optimization (CRO)

- Rationale: With relatively low performance in email and social media channels, this skill will help identify and implement high-converting content elements, potentially bringing these channels closer to the paid ads performance level.

2. New Product Sales & Product Launch Conversion Rate

Skill 1: Marketing Automation & Sales Funnel Engineering

- Rationale: The low 1.5% launch conversion rate suggests inefficient customer journey mapping. This skill will help create automated nurture sequences that guide prospects through the sales funnel more effectively.

Skill 2: Product Story Development & Content Strategy

- Rationale: With only 70 units sold, there's likely a gap in compelling product narrative. This skill will help create more persuasive product launches that resonate with target audiences.

At the bottom of the chat window, there is a text input field with the placeholder "Reply to Claude..." and icons for a pencil and a camera.

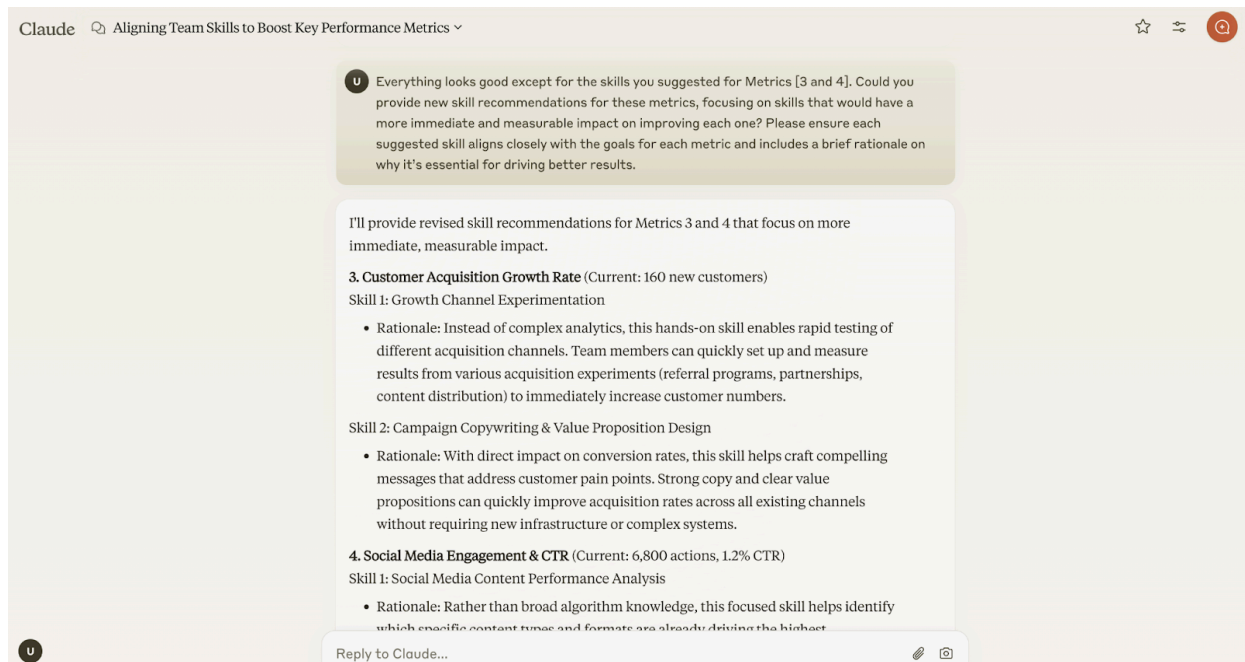
The AI will respond to you with the 2 skills it deems necessary for improving each specific key metric you've outlined. If you don't like some of the suggestions, you can always ask to revise the list.

Here's a simple "refresher" prompt to generate new skills for some specified (or all) metrics:

Sample prompt:

Everything looks good except for the skills you suggested for Metrics [specify the metric #s]. Could you provide new skill recommendations for these metrics, focusing on skills that would have a more immediate and measurable impact on improving each one? Please ensure each suggested skill aligns closely with the goals for each metric and includes a brief rationale on why it's essential for driving better results.

Example:



Note: Whether you find them yourself or with Claude's help, make sure you've got two key skills for each metric before moving on!

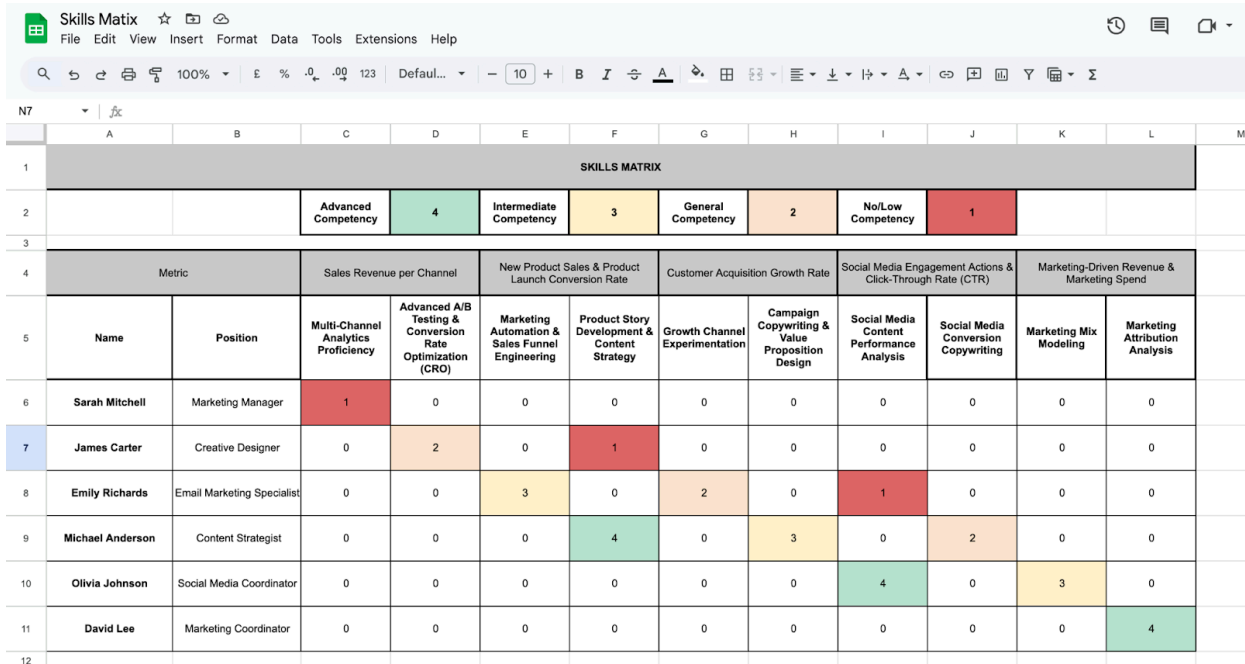
Step 2: Create a skills matrix template

It's time to build the skills matrix template that'll let you plot scores for each employee across each of the 10 technical skills you just generated.

The rule of thumb for creating a skills matrix is to list the employees' names on one axis and the essential skills you've generated on the other. To make the matrix more structured, you can also

include each employee's job position and group the skill names under the corresponding metrics under which they fall.

Here's an example:



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	SKILLS MATRIX												
2			Advanced Competency	4	Intermediate Competency	3	General Competency	2	No/Low Competency	1			
3													
4	Metric		Sales Revenue per Channel		New Product Sales & Product Launch Conversion Rate		Customer Acquisition Growth Rate		Social Media Engagement Actions & Click-Through Rate (CTR)		Marketing-Driven Revenue & Marketing Spend		
5	Name	Position	Multi-Channel Analytics Proficiency	Advanced A/B Testing & Conversion Rate Optimization (CRO)	Marketing Automation & Sales Funnel Engineering	Product Story Development & Content Strategy	Growth Channel Experimentation	Campaign Copywriting & Value Proposition Design	Social Media Content Performance Analysis	Social Media Conversion Copywriting	Marketing Mix Modeling	Marketing Attribution Analysis	
6	Sarah Mitchell	Marketing Manager	1	0	0	0	0	0	0	0	0	0	
7	James Carter	Creative Designer	0	2	0	1	0	0	0	0	0	0	
8	Emily Richards	Email Marketing Specialist	0	0	3	0	2	0	1	0	0	0	
9	Michael Anderson	Content Strategist	0	0	0	4	0	3	0	2	0	0	
10	Olivia Johnson	Social Media Coordinator	0	0	0	0	0	0	4	0	3	0	
11	David Lee	Marketing Coordinator	0	0	0	0	0	0	0	0	0	4	
12													

Tip: In Google Sheets, use conditional formatting to color-code cells based on scores. It'll help you quickly see where each employee shines or struggles and give you a clear view of the team's overall strengths and weaknesses!

Step 3: Gather data for each employee's skills

The most straightforward way to fill out a skills matrix is to use manager evaluations or self-assessments. However, some combine the two approaches, calculating the average, and even include peer reviews for a more comprehensive assessment.

There's really no right or wrong way to create a skills matrix.

Sometimes, hands-on managers may be better at evaluating who's more equipped for specific expected tasks. In other cases, the employees themselves may be more accurate in assessing which skills they are strongest in.

You can also combine these approaches by asking employees to rate themselves while also having managers rate each team member's performance. With this method, you must calculate the average of all the ratings to determine the final scores to plot in the matrix.

Tip: When asking employees and other people to fill out the skills matrix, remember to define the scoring system clearly to avoid confusion.

After gathering the necessary data from manager evaluations, self-assessments, peer reviews, or a combination of these, your skills matrix should look like the example below.

Example output: [Skills Matrix Sample Document](#)

	A	B	C	D	E	F	G	H	I	J	K	L
1	SKILLS MATRIX											
2			Advanced Competency	4	Intermediate Competency	3	General Competency	2	No/Low Competency	1		
3												
4	Metric		Sales Revenue per Channel		New Product Sales & Product Launch Conversion Rate		Customer Acquisition Growth Rate		Social Media Engagement Actions & Click-Through Rate (CTR)		Marketing-Driven Revenue & Marketing Spend	
5	Name	Position	Multi-Channel Analytics Proficiency	Advanced A/B Testing & Conversion Rate Optimization (CRO)	Marketing Automation & Sales Funnel Engineering	Product Story Development & Content Strategy	Growth Channel Experimentation	Campaign Copywriting & Value Proposition Design	Social Media Content Performance Analysis	Social Media Conversion Copywriting	Marketing Mix Modeling	Marketing Attribution Analysis
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8	Emily Richards	Email Marketing Specialist	2	3	4	2	2	3	1	2	2	2
9	Michael Anderson	Content Strategist	2	1	2	4	2	4	2	3	1	1
10	Olivia Johnson	Social Media Coordinator	2	2	1	3	2	2	4	4	2	1
11	David Lee	Marketing Coordinator	3	2	3	2	4	3	3	2	2	2
12												
13												

The skills matrix you create will help you assign team members to be responsible for specific key metrics during the organizational restructuring and delegate tasks to address the department's weaknesses.

Tip: It's a good idea to ask employees how comfortable they feel taking on a role that relies on a specific skill. After all, the best scenario is having skilled people do tasks they actually enjoy!

Phase 3: Set up a 90-day action plan with specific milestones and checkpoints

At this point, we can start the process of creating a detailed 90-day action plan with clear milestones and checkpoints by following the steps below.

Step 1: Set up general goals for each performance metric

Let's revisit the 5 metrics you chose to measure your department's performance earlier.

For the examples we've been using, those are:

1. Sales Revenue per Channel
2. New Product Launch & Product Launch Conversion Rate
3. Customer Acquisition Growth Rate

4. Social Media Engagement & CTR
5. Marketing-Driven Revenue & Marketing Spend

For each metric, outline what you want your department to achieve in 90 days, and organize these goals in a structured format, like the table below.

Example:

Metric	Goals
Sales Revenue per Channel	Significantly increase the average sales revenue from all key marketing channels.
New Product Launch & Product Launch Conversion Rate	Successfully launch a new product and achieve targeted sales and conversion rates.
Customer Acquisition Growth Rate	Increase new customer acquisition.
Social Media Engagement & CTR	Improve social media engagement and click-through rates (CTR).
Marketing-Driven Revenue & Marketing Spend	Significantly improve social media engagement and drive higher CTR on all platforms.

Tip: At this stage, it doesn't matter if your goals are vague. Just brainstorm all goals and ideas that come to mind for that particular metric, then proceed to the next step

Step 2: Turn your generic goals into SMART goals

During this step, you'll transform your brainstormed "generic" goals into SMART goals.

SMART goals refer to objectives that are **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound.

By default, if you use the metrics of your department performance baseline and specify the improvements you want to see in each data point, you'll be creating SMART goals.

Here's the department performance baseline we generated earlier:

(Monthly Average) Department Performance Baseline

Metric #1: Sales Revenue per Channel

Social Media: \$2,820

Email Marketing: \$2,140

Paid Ads: \$4,500

Organic Search (SEO): \$1,050

Metric #2: New Product Sales & Product Launch Conversion Rate

New Product Units Sold: 70 units

Product Launch Conversion Rate: 1.5%

Metric #3: Customer Acquisition Growth Rate

New Customers Acquired This Period: 160 customers

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

Total Social Media Interactions: 6,800 actions

Social Media CTR: 1.2%

Email Campaign CTR: 1.0%

Metric #5: Marketing-Driven Revenue & Marketing Spend

Total Revenue from Marketing Campaigns: \$23,000

Total Marketing Spend: \$7,500

Apply your generic goals to each of the data points to transform them into SMART goals.

For example, if you want to “Improve social media engagement and click-through rates (CTR),” how much of an improvement do you want to achieve from 6,800 social media engagement actions, 1.2% social media CTR, and 1% email campaign CTR?

The answer to this question will help you design a SMART 90-day goal.

Example:

Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)

- Total Social Media Interactions: Target of 10,000 actions
- Social Media CTR: Target of 1.8%
- Email Campaign CTR: Target of 1.5%

After specifying your target values for each data point of the key metrics, create a table that compares the department's current performance baseline with the 90-day goals for each metric's data point.

Example:

Baseline Monthly Average Values vs. 90-Day Goals			
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E21			
	A	B	C
1	Baseline Monthly Average Values vs. 90-Day Goals		
2		Current Baseline	90-Day-Goals
3	Metric #1: Sales Revenue per Channel		
4	Social Media	\$2,820	\$4,500
5	Email Marketing	\$2,140	\$3,200
6	Paid Ads	\$4,500	\$6,000
7	Organic Search (SEO)	\$1,050	\$1,800
8	Metric #2: New Product Sales & Product Launch Conversion Rate		
9	New Product Units Sold	70 units	150 units
10	Product Launch Conversion Rate	1.50%	2.50%
11	Metric #3: Customer Acquisition Growth Rate		
12	New Customers Acquired This Period	160 customers	250 customers
13	Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)		
14	Total Social Media Interactions	6,800 actions	10,000 actions
15	Social Media CTR	1.20%	1.80%
16	Email Campaign CTR	1.00%	1.50%
17	Metric #5: Marketing-Driven Revenue & Marketing Spend		
18	Total Revenue from Marketing Campaigns	\$23,000	\$35,000
19	Total Marketing Spend	\$7,500	\$8,000
20			

Note: Use this table as a visual roadmap to track your progress from baseline to goal. Set realistic targets and adjust as needed. For some metrics, you might not need to increase overall numbers—just focus on improving the areas that need it most.

In a simple sentence, clearly define how you want each metric to improve by mentioning both the baseline values and 90-day goals for each data point. You can do this on your own or with the help of AI.

Sample prompt:

Turn the 90-day goals for each metric into a one-sentence statement, keeping in mind that these values are monthly averages. Include the exact title for each metric. Also, include both the baseline values and the target values in your statement.

[insert the values from the “performance baseline vs 90-day goals” table]

Example:

🔗 Summarizing 90-Day Goals for Key Marketing Metrics ▾

- U** Turn the 90-day goals for each metric into a one-sentence statement, keeping in mind that these values are monthly averages. Include the exact title for each metric. Also include both the baseline values and the target values in your statement.

Baseline Monthly Average Values vs. 90-Day Goals

Metric	Current Baseline (Monthly Average)	90-Day-Goals (Monthly Average)
Metric #1: Sales Revenue per Channel		
Social Media	\$2,820	\$4,500
Email Marketing	\$2,140	\$3,200
Paid Ads	\$4,500	\$6,000
Organic Search (SEO)	\$1,050	\$1,800
Metric #2: New Product Sales & Product Launch Conversion Rate		
New Product Units Sold	70 units	150 units
Product Launch Conversion Rate	1.50%	2.50%
Metric #3: Customer Acquisition Growth Rate		
New Customers Acquired This Period	160 customers	250 customers
Metric #4: Social Media Engagement Actions & Click-Through Rate (CTR)		
Total Social Media Interactions	6,800 actions	10,000 actions
Social Media CTR	1.20%	1.80%
Email Campaign CTR	1.00%	1.50%
Metric #5: Marketing-Driven Revenue & Marketing Spend		
Total Revenue from Marketing Campaigns	\$23,000	\$35,000
Total Marketing Spend	\$7,500	\$8,000

I'll convert each metric's goals into clear, one-sentence statements:

1. Sales Revenue per Channel: Increase monthly average revenue from \$2,820 to \$4,500 for Social Media, from \$2,140 to \$3,200 for Email Marketing, from \$4,500 to \$6,000 for Paid Ads, and from \$1,050 to \$1,800 for Organic Search.
2. New Product Sales & Product Launch Conversion Rate: Improve monthly average new product sales from 70 to 150 units while increasing the product launch conversion rate from 1.50% to 2.50%.
3. Customer Acquisition Growth Rate: Expand the monthly average of new customers acquired from 160 to 250 customers.
4. Social Media Engagement Actions & Click-Through Rate (CTR): Boost monthly average social media interactions from 6,800 to 10,000 actions while increasing social media CTR from 1.20% to 1.80% and email campaign CTR from 1.00% to 1.50%.
5. Marketing-Driven Revenue & Marketing Spend: Scale monthly average marketing campaign revenue from \$23,000 to \$35,000 while maintaining efficient spending with an increase from \$7,500 to \$8,000 in total marketing spend.

📋 Copy ↺ Retry 🗑️ 🗨️



Claude can make mistakes. Please double-check responses.

Reminder: Don't forget to record the responses you get from Claude in a secure document, as you'll need to revisit these sets of data regularly!

Step 3: Develop monthly targets for each metric

This time, we'll generate monthly targets for each of your chosen metrics based on their monthly goal statement.

These monthly goals will serve as checkpoints that will make it easier to track monthly progress toward your 90-day goals.

If done manually, this process can take quite a while. However, we'll streamline the conversion of goals into monthly targets using Claude.

Sample prompt:

Metric Name: [Insert Metric Name]

90-Day Goal Statement: [Insert the metric's 90-day goal in a statement form].

Instructions: Please calculate and provide a **monthly goal statement** for this metric over the next 3 months. Divide the overall goal into 3 progressive monthly increments. For each month, provide the goal in a similar format to the following: 'The goal is to increase [metric] from [current value] to [target value].'

Return the results with Month 1, Month 2, and Month 3 statements. Only one sentence for each metric, so adjust the flow.

Example:

U Metric Name: Marketing-Driven Revenue & Marketing Spend

90-Day Goal Statement: Scale monthly average marketing campaign revenue from \$23,000 to \$35,000 while maintaining efficient spending with an increase from \$7,500 to \$8,000 in total marketing spend.

Instructions: Please calculate and provide a **monthly goal statement** for this metric over the next 3 months. Divide the overall goal into 3 progressive monthly increments. For each month, provide the goal in a similar format to the following: 'The goal is to increase [metric] from [current value] to [target value].'

Return the results with Month 1, Month 2, and Month 3 statements. Only one sentence for each metric, so adjust the flow.

Let me help break down this 90-day goal into monthly increments. I'll calculate progressive targets for both revenue and spending.

For revenue, we need to increase from \$23,000 to \$35,000 (+\$12,000 total)

- Monthly increment: ~\$4,000 per month

For spending, we need to increase from \$7,500 to \$8,000 (+\$500 total)

- Monthly increment: ~\$167 per month

Month 1:

The goal is to increase monthly marketing campaign revenue from \$23,000 to \$27,000 while growing marketing spend from \$7,500 to \$7,667.

Month 2:

The goal is to increase monthly marketing campaign revenue from \$27,000 to \$31,000 while growing marketing spend from \$7,667 to \$7,834.

Month 3:

The goal is to increase monthly marketing campaign revenue from \$31,000 to \$35,000 while growing marketing spend from \$7,834 to \$8,000.

Copy ⌂ Retry ⌂

Note: Repeat the process for all 5 metrics. Neatly organize the 3 monthly goals of each metric to avoid messing up your data.

Step 4: Build a 90-day plan for each metric

Instead of creating one 90-day action plan that includes the tasks and goals for all metrics and performance indicators, we'll generate a unique 90-day action plan for each metric.

This approach will simplify goal management and tracking, allowing employees responsible for each metric to focus on their specific tasks.

To build an action plan, use the monthly goals generated earlier for each metric as a guide to assign weekly task themes throughout the 90-day period. Then, within these themes, assign tasks with measurable outcomes for your team to complete throughout the 90 days.

Here's an example of a 90-day action plan with weekly themes (without tasks):

90-Day Action Plan: Marketing-Driven Revenue & Marketing Spend Optimization

Month 1 Goal

Increase Total Revenue from Marketing Campaigns from \$23,000 to \$26,000 while increasing Marketing Spend from \$7,500 to \$7,700

- Week 1: Analysis & Audit
- Week 2: Campaign Setup & Strategy Development
- Week 3: Campaign Launch & Execution
- Week 4: Optimization & Reporting

Month 2 Goal

Increase Total Revenue from Marketing Campaigns from \$26,000 to \$29,000 while increasing Marketing Spend from \$7,700 to \$7,850

- Week 5: Analysis & Refinement
- Week 6: Campaign Expansion & Upsell Focus
- Week 7: Launch & Execute New Campaigns
- Week 8: Mid-Campaign Optimization & Reporting

Month 3 Goal

Increase Total Revenue from Marketing Campaigns from \$29,000 to \$35,000 while increasing Marketing Spend from \$7,850 to \$8,000

- Week 9: Performance Review & Strategic Adjustments
- Week 10: Campaign Intensification & Lead Nurturing
- Week 11: Scaling & Testing
- Week 12: Final Optimization & Reporting

Tip: You can write the themes and tasks on your own, collaborate with your team, or even use AI to help generate the data. Whatever approach you take, just be sure to schedule regular review sessions (like every two weeks) to check on completed tasks, assess results, and align on next steps!

Tips for generating weekly themes and tasks yourself

Here are some tips for completing a 90-day action plan with specific weekly themes and tasks yourself:

- Start by analyzing what works and what doesn't.
- Set clear weekly themes that are aligned with your monthly goals.
- Under each weekly theme, prioritize high-impact tasks that generate fast results.
- Make sure every task has a measurable metric to track performance.
- Include regular time for personal and team reflection (e.g., every two weeks).
- Don't be afraid of adapting the tasks as needed depending on the outcomes and reflection.

Using AI to generate the 90-day action plan

When using Claude to generate a metric's 90-day action plan, simply provide the metric's 3 monthly goals generated earlier. From there, the AI will generate a complete 90-day action plan for the specific metric you've chosen to focus on.

Note: The monthly goals are built off your department's performance baseline, which reflects your team's goals, strengths, weaknesses, and responsibilities. This allows the AI to create a 90-day action plan with themes and tasks that match your department's needs.

Sample prompt:

Based on the 90-day goal set by our [Department Name], I have established three monthly goals aimed at enhancing the performance of [Metric Name].

I need a structured breakdown of each month's plan, including weekly tasks with quantifiable metrics.

Each month should have a primary goal aligned with the revenue target, and each week should focus on a specific theme (e.g., analysis, campaign setup, optimization, etc.).

Each weekly theme should include 3-5 specific tasks, each with a quantifiable metric. Schedule personal reflection and team meetings every two weeks to review completed tasks, assess current results, and set future objectives.

In week 12, add a "Post-Turnaround Retrospective" step where the department conducts a full review of the 90-day restructuring, analyzing key learnings and documenting areas for long-term improvement.

Please use the following monthly goals: [Insert the Metric's 3 Monthly Goals]

Use the format below: Format: Week X: Theme/TitleTask 1:
[Description]Quantifiable metric: [Metric description]

Also, add a title indicating that this is the 90-day action plan for the specified metric.

Example:

The screenshot displays the Claude AI interface with a chat window on the left and a document preview on the right. The chat window shows a user prompt asking for a 90-day goal set and a structured breakdown of monthly plans with weekly tasks and quantifiable metrics. The AI response outlines a plan with three monthly goals, weekly themes, and specific tasks with metrics. The document preview on the right shows the generated 90-day action plan, titled '90-Day Action Plan: Marketing-Driven Revenue & Marketing Spend Optimization'. It details the monthly goals, weekly tasks, and metrics for the first two weeks.

90-Day Action Plan: Marketing-Driven Revenue & Marketing Spend Optimization

Month 1: Revenue Growth \$23,000 → \$27,000 | Marketing Spend \$7,500 → \$7,667

Week 1: Audit & Analysis

- Task 1: Conduct performance audit of existing marketing campaigns
 - Metric: Complete analysis of top 10 campaigns by ROI
- Task 2: Identify underperforming channels and allocation inefficiencies
 - Metric: Document 5 specific areas for optimization with expected impact
- Task 3: Create spending reallocation framework
 - Metric: Develop model showing projected ROI improvements for each \$1,000 reallocated
- Task 4: Establish daily performance tracking dashboard
 - Metric: Set up automated reporting for 8 key metrics

Week 2: Strategic Planning & Campaign Setup

- Task 1: Develop new campaign concepts based on audit findings
 - Metric: Create 3 new campaign proposals with projected ROI
- Task 2: Optimize targeting parameters for existing campaigns
 - Metric: Refine audience segments for top 5 campaigns
- Task 3: Update bidding strategies across platforms
 - Metric: Implement automated bidding in 80% of campaigns
- Bi-weekly Review:** Team meeting to assess Week 1-2 progress

Reminder: Consider the 90-day action plan generated by the AI as a first draft of the actual action plan you'll follow. Review the weekly themes, tasks, and quantifiable metrics. Then, make necessary adjustments to ensure they're aligned with your specific goals, objectives, and areas for improvement.

Tip: You can ask Claude to review, edit, or revise any part of the 90-day action plan it generates. Just provide clear instructions, as you would with any team member, and let Claude deliver the results you need.

After refinements, arrange your 90-day action plan in a way that makes it easy to track progress week by week. You can use the example output below as inspiration.

Example output: [90-Day Action Plan Sample Document](#)

Phase 4: Design and implement a new organizational structure using the provided templates

A data-driven organizational restructure will help you reach your 90-day goals faster.

Refer to the skills matrix you created, then use the steps outlined below to restructure your department.

Step 1: Analyze your current department structure

To start, you must note what works and doesn't in your current department structure. After all, there's no need to fix what's already working.

You can use these methods of data collection:

- One-on-one interviews
- Observing the department's day-to-day operations

Make sure to look into the following factors to assess the overall performance of your organizational structure:

- **Workflows and processes:** How does work move through your department? Identify areas that can be improved or streamlined.
- **Communication:** List the strengths and weaknesses of how team members communicate with each other.
- **Reasons you're not hitting metrics:** Make observations or ask team members for insights through surveys or interviews.
- **Resource allocation:** How are finances and workforce distributed? Are there skill gaps that must be addressed?

Step 2: Identify gaps in the department's competency

Combine the data from your skills matrix with your assessment of the department's performance. Look for gaps where additional training or new hires might be needed to hit the goals for each metric.

The restructure aims to close those gaps and boost the metrics so that you can hit your 90-day targets.

Once you better understand your department's current structure and performance gaps, it's time to start restructuring.

Step 3: Choose an organization structure type to follow

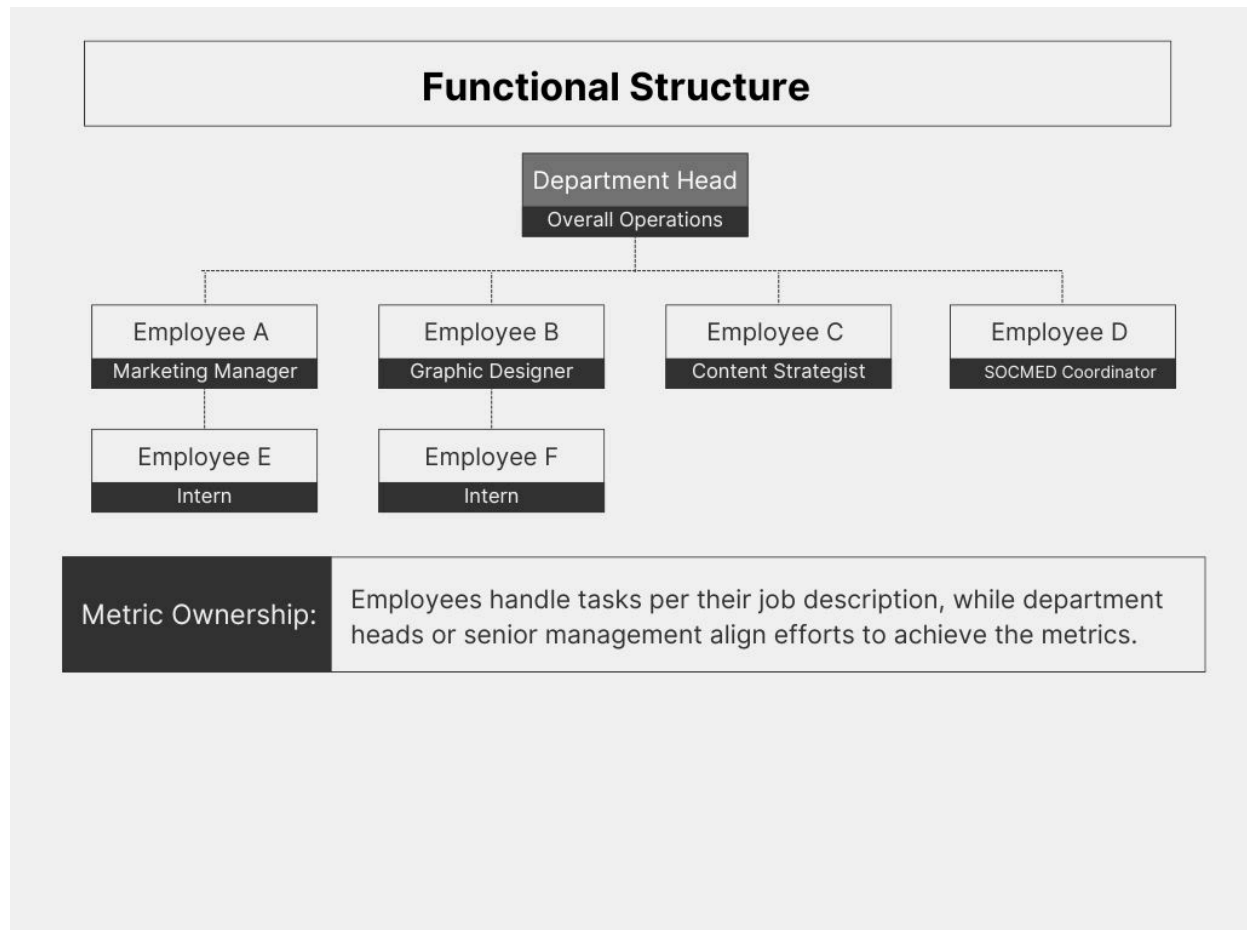
There's no one-size-fits-all approach to a department restructure. You might simply redefine roles or assign new responsibilities within the current structure, keeping the existing framework intact.

On the other hand, you may choose to rebuild the entire structure of the department.

Revisit the 7 types of organizational structure to assess if your current setup still meets the department's needs. While these structures are often used at the organization-wide level, they can also be adapted for individual departments.

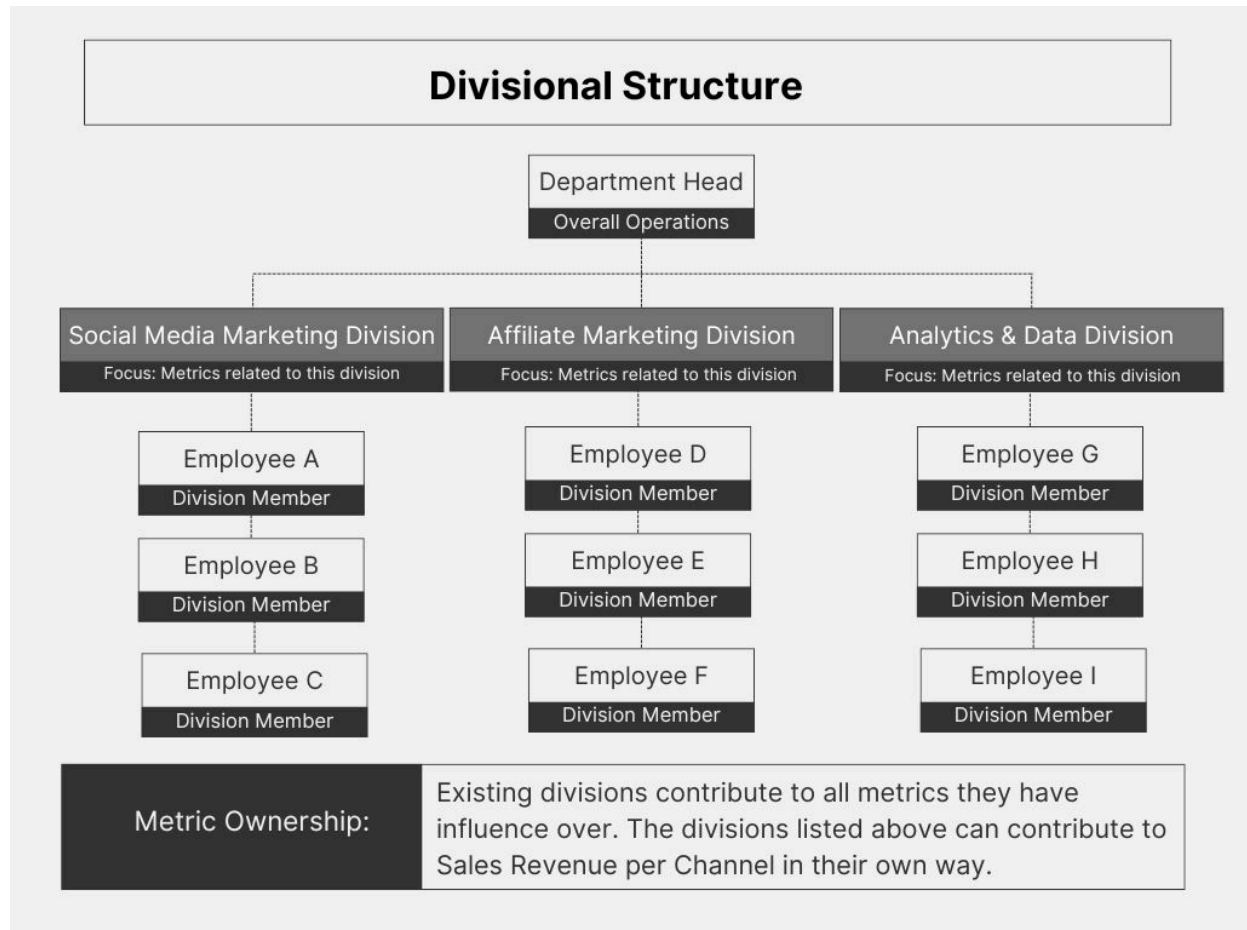
Here's how each structure type might look at the department level

Functional Structure: Employees are grouped by job function and are not assigned responsibility for specific metrics. Expect clear role definitions but unclear accountability for specific metrics.

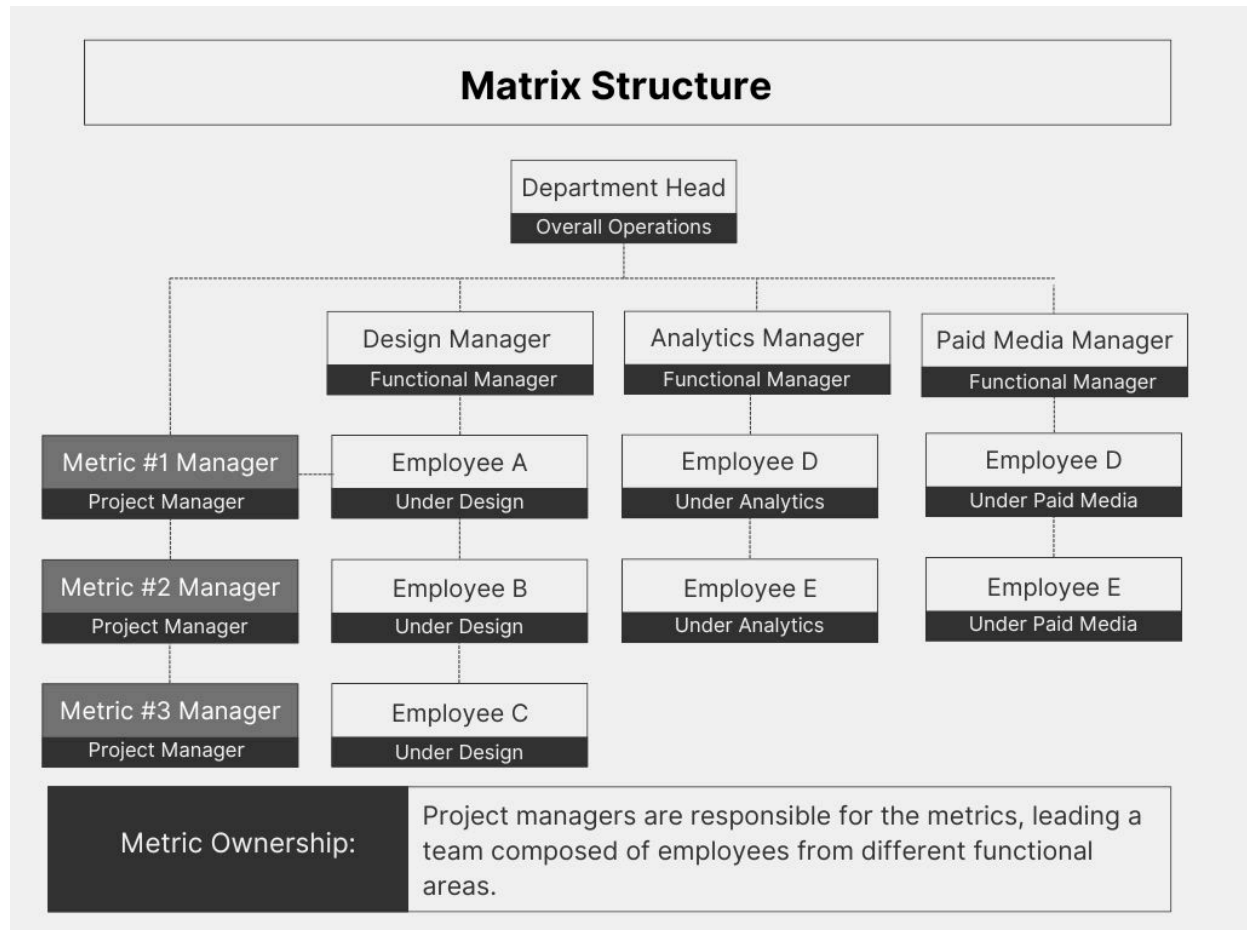


Important: This structure may not be applicable if you want to assign specific metrics to a different 90-day action plan. There's nobody to hold accountable for ensuring every metric's monthly goals and weekly tasks are aligned.

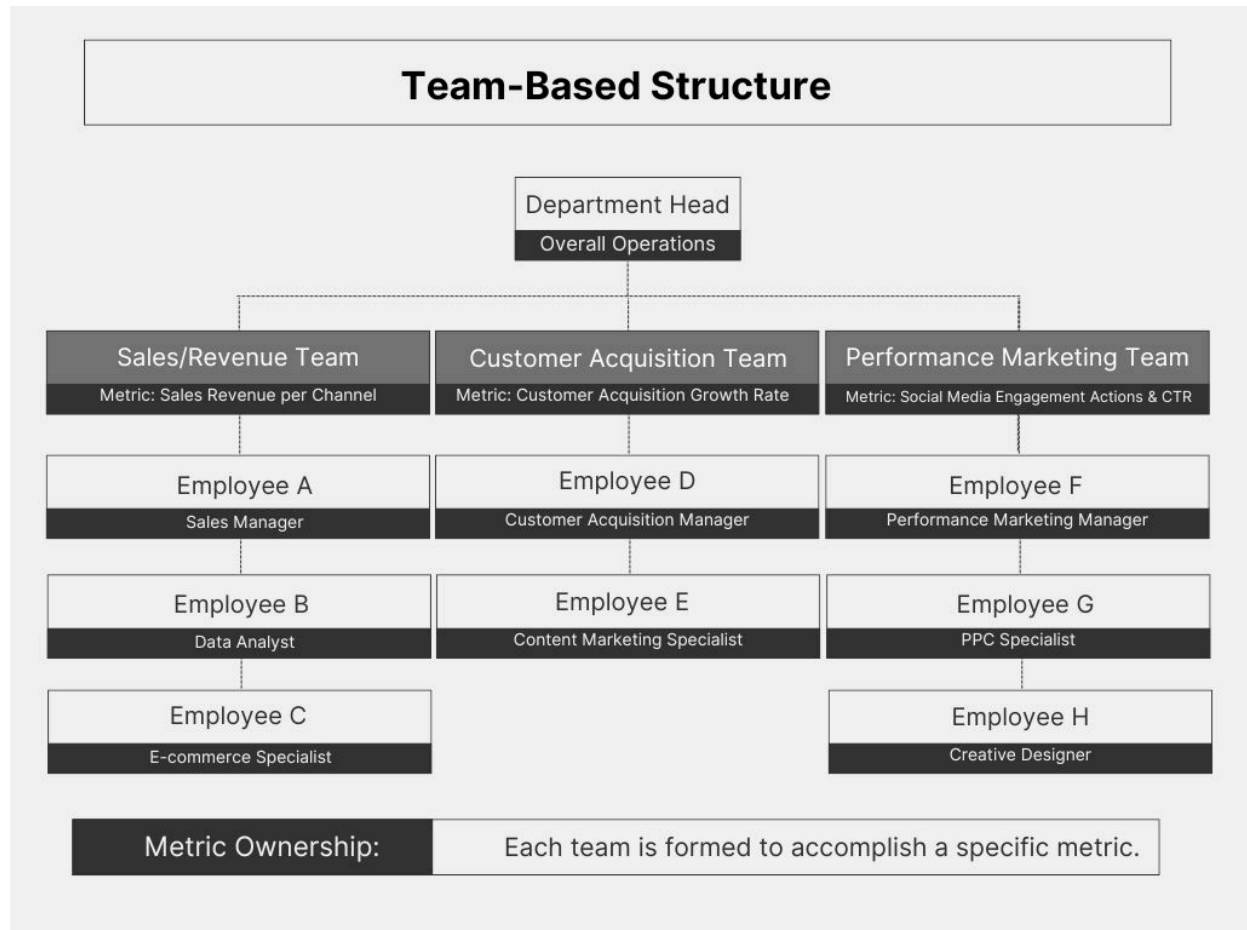
Divisional: You typically see this in bigger departments where divisions are set up for specific focus areas (like Food Products vs. Clothing). Divisions work toward shared metrics, but each is responsible for its own results.



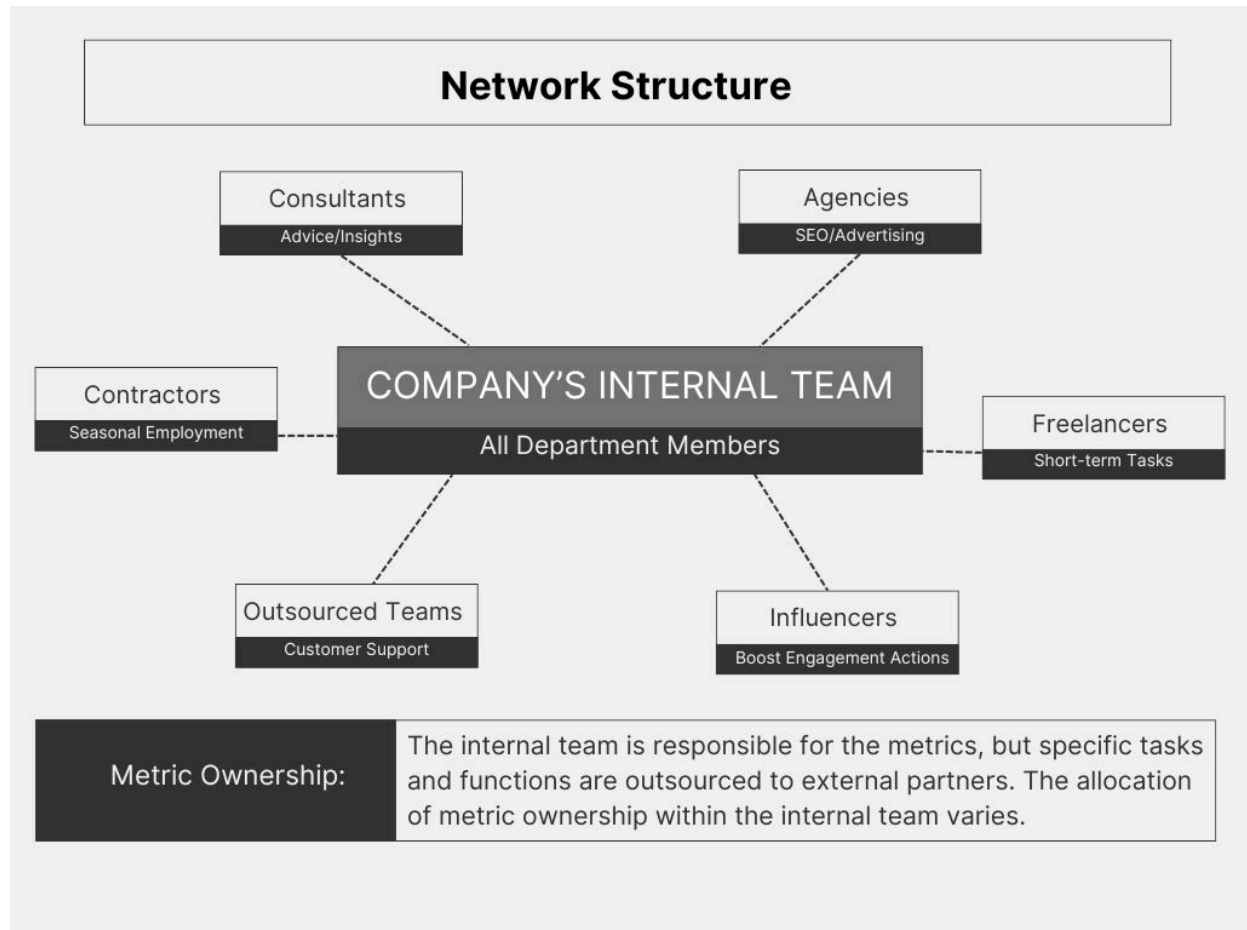
Matrix: Employees are managed by their functional managers but also temporarily report to project managers who oversee the department's 90-day goals for each metric.



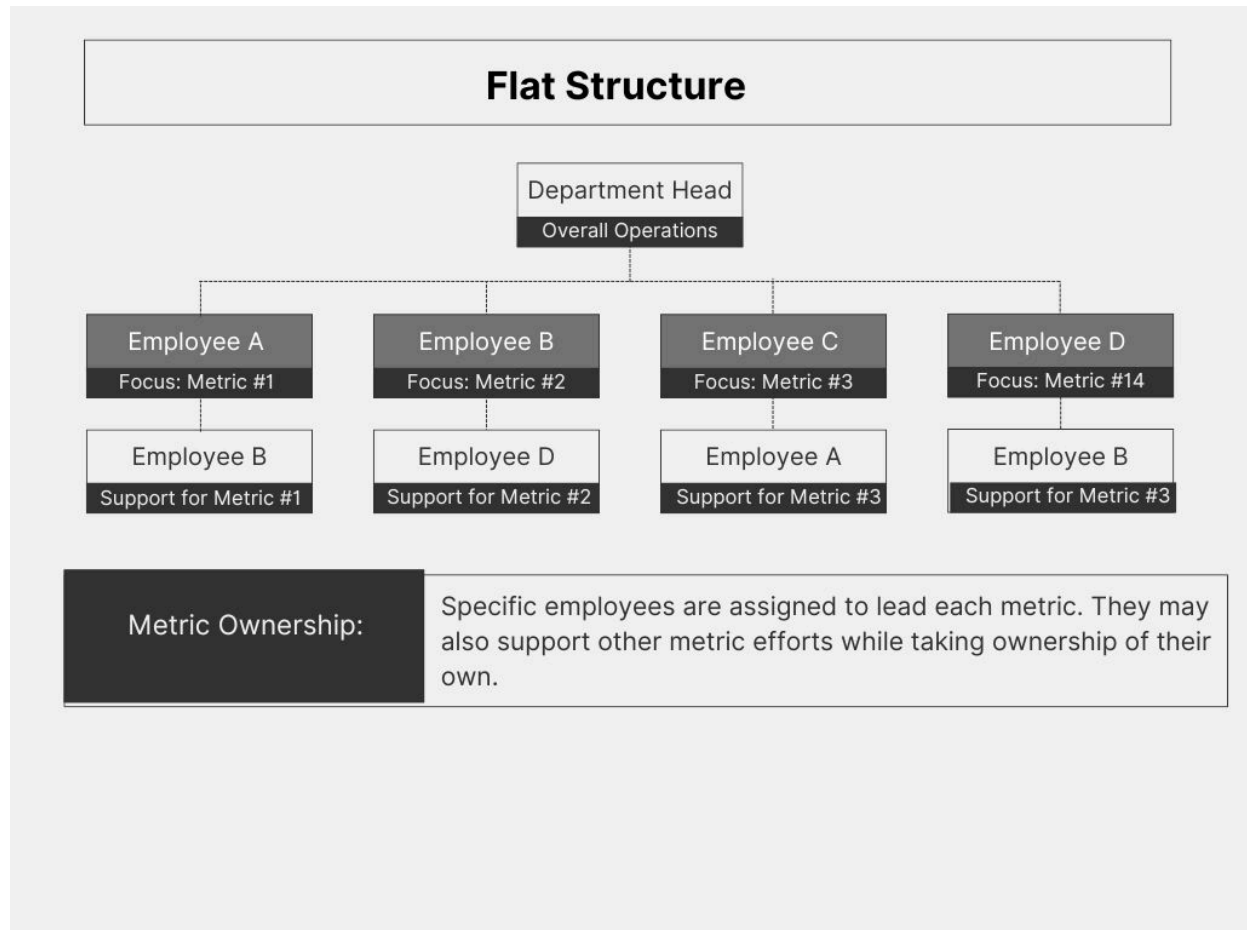
Team-based: Specific teams focus on each metric to drive results. Poor communication between teams can lead to redundancy.



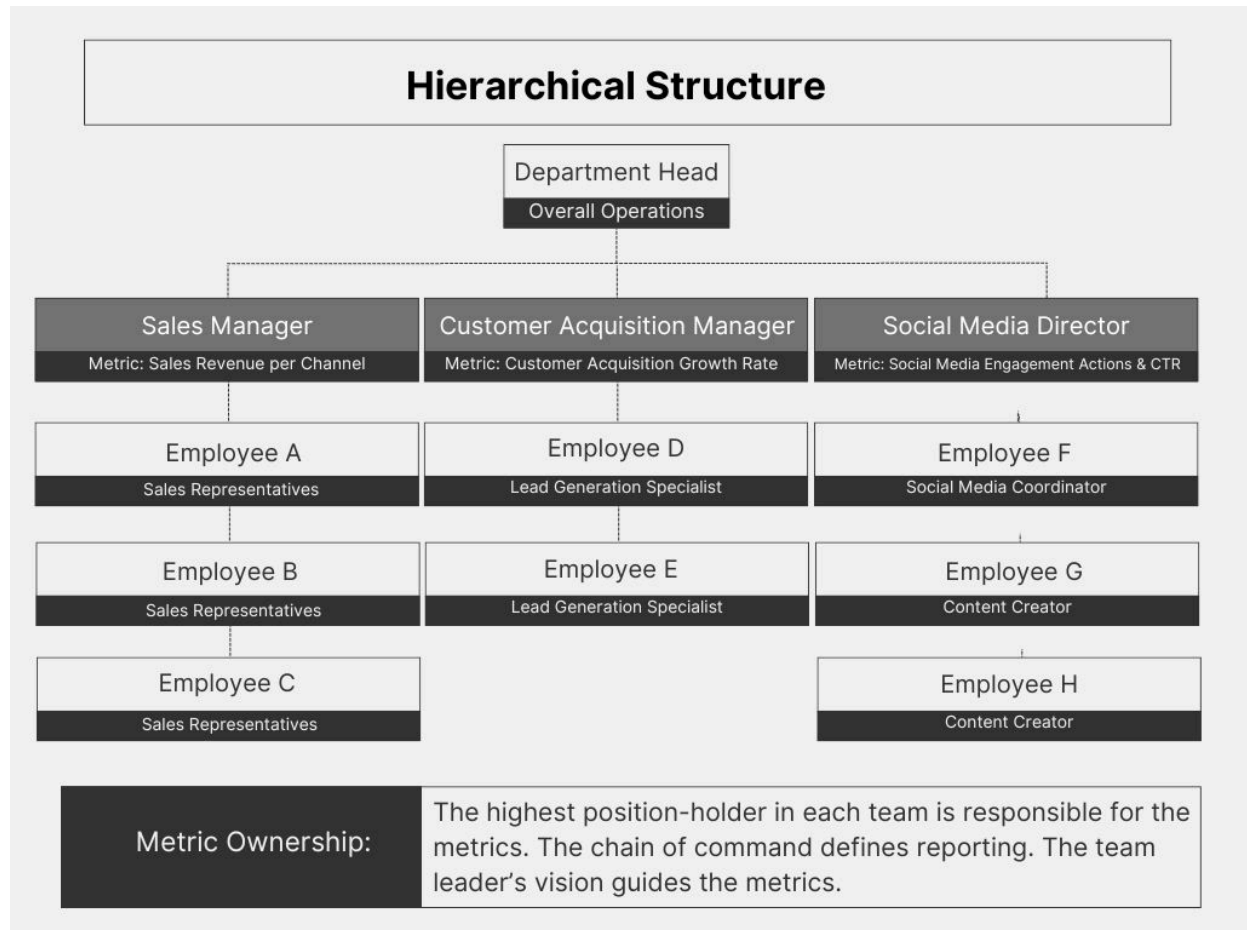
Network: The department works with external partners or freelancers to help achieve the metrics. The internal team decides how tasks are managed and who's accountable for results.



Flat (Horizontal): Employees are directly assigned metrics but have more freedom to make decisions and take ownership of their work. Team members can work together to help each other achieve their metric's goals.



Hierarchical: There are clear levels of authority where employees report to managers who oversee the metrics. Employees follow instructions from their direct supervisors to meet specific goals.



Regardless of which structure you stick to, make sure that you have clear roles and responsibilities and establish clear communication structures in place to align the team with the 90-day goals.

Expect to implement any of the following to achieve your restructuring goals:

- Hiring new talent
- Reassigning employees
- Reducing redundancies

Step 4: Decide how to structure the employees

Think about where each employee should fit in our chosen organizational structure. Your skills matrix is your best friend for this process, so make sure to base your decisions on it.

Don't forget about assessing the dynamics of your department. Is everyone better at working alone or as a team? Will they be more productive within a hierarchical structure, or is a flat structure, with more autonomy, the better option?

Tip: You don't have to carry the weight of all decisions on your own! Consult with HR, stakeholders, managers, team leaders, and even employees to gather their feedback on specific aspects. Use their insights to guide your restructuring plan.

Make sure to map out the roles and responsibilities of each employee with clear job descriptions, expectations, and defined reporting lines. Clarify who's leading what so employees are not confused when the implementation process starts.

Step 5: Implement the new organizational structure

All that's left to do to bring your new organizational structure to life is to communicate the changes.

Announce the structure changes well before the implementation stage. When you do, clearly explain the reasoning behind the restructuring, encourage feedback for any necessary adjustments, and set clear expectations for all team members.

Give everyone on the team time to adjust, especially if you're making significant changes to roles and responsibilities. Provide training support and check in regularly until everyone feels comfortable in their new roles.

We'll go deeper into how we can run effective restructuring communication meetings later in phase 6.

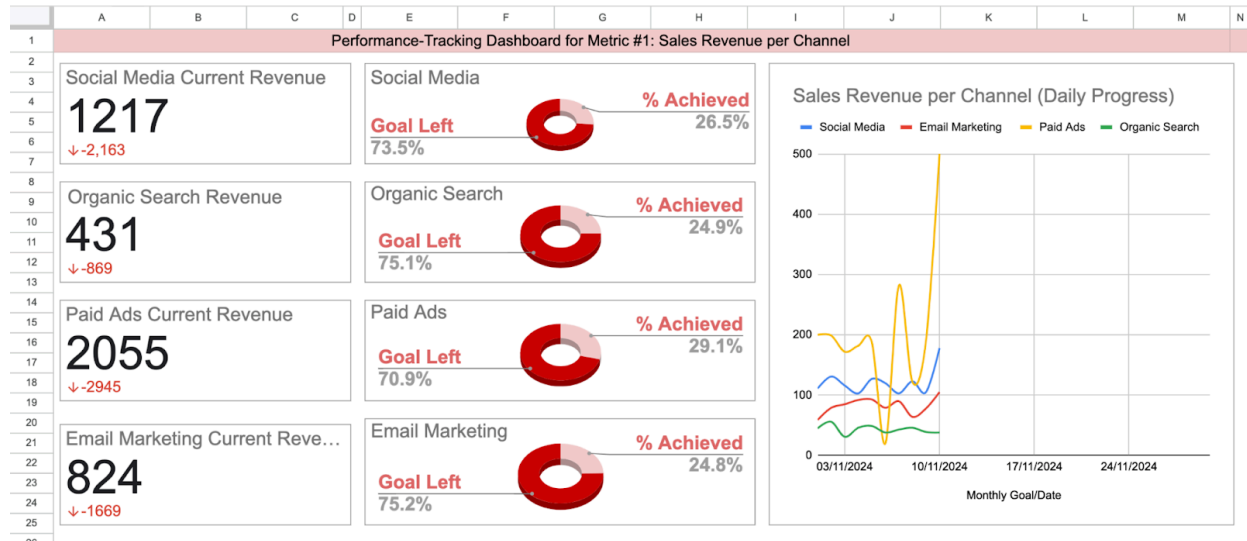
Important: Don't start the 90-day countdown unless everyone is well-adjusted in their new roles. Chances are, employees cannot complete the necessary tasks within the timeline if they're not properly trained and supported.

Phase 5: Create automated performance-tracking dashboards in Google Sheets

Tracking results when you implement new organizational structures and setting short-term, time-bound goals is crucial. Hence, the next step is to create an automated performance-tracking dashboard in Google Sheets.

Others build very complicated versions of these dashboards.

However, we're going to keep this tutorial simple. For each metric tracked, you'll have a dashboard similar to the one below in just minutes!



This dashboard automatically updates depending on the daily data inputted by the employees.

Ready to create your own Google Sheets automated dashboard?

Step 1: Prepare the data needed

To create performance-tracking dashboards, you'll need the following information:

- The data points of each metric
- The monthly goals of each data point

For example, for the metric “Sales Revenue per Channel,” here are the four data points with their goals:

- Social Media revenue, which has the first monthly goal of \$3,380
- Email Marketing revenue, which must reach \$2,493 by the first month
- Paid Ads revenue that must exceed \$5,000
- Organic Search revenue that must reach \$1,300

Gather the same information for all metrics covered.

Step 2: Create the skeleton of your Google Sheets database

Open a new Google Sheets document. With your data, mimic the format of this database template.

	A	B	C	D	E	F	G
1			Metric #1			Metric #2	
2	Current Total	Sum/Ave of the Input Below	Sum/Ave of the Input Below	Sum/Ave of the Input Below	Sum/Ave of the Input Below	Sum/Ave of the Input Below	Sum/Ave of the Input Below
3	Monthly Goal	First Month's Goal	First Month's Goal	First Month's Goal	First Month's Goal	First Month's Goal	First Month's Goal
4	Date	Data Point A	Data Point B	Data Point C	Data Point D	Data Point A	Data Point B
5	01/11/2024						
6	02/11/2024						
7	03/11/2024						
8	04/11/2024						
9	05/11/2024						
10	06/11/2024						
11	07/11/2024						
12	08/11/2024						
13	09/11/2024						
14	10/11/2024						
15	11/11/2024						
16	12/11/2024						
17	13/11/2024						
18	14/11/2024						
19	15/11/2024						
20	16/11/2024						
21	17/11/2024						
22	18/11/2024						
23	19/11/2024						
24	20/11/2024						
25	21/11/2024						
26	22/11/2024						
27	23/11/2024						
28	24/11/2024						

Note: Different metrics have different numbers of data points. Adjust the template as needed.

Step 3: Plot in the names of the data points and the metrics

Like the image below, write the specific metrics names and the data points under each metric. You can also color-code the metrics to keep them visually organized.

	B	C	D	E	F
	Metric #1: Sales Revenue per Channel				Metric #2: New Products
Current Total					
Monthly Goal					
Date	Social Media	Email Marketing	Paid Ads	Organic Search	New Products
2024					
2024					
2024					

Step 4: Fill in the monthly goals and the formula for the “current total”

Right above each data point, type the data point’s specific, quantifiable monthly goal you recorded earlier. Double-check the value because it’s a critical component of your charts dashboard.

After filling in the monthly goal of each data point, type the formula for the white cells below the metrics’ names.

Click cell B2, then type: “=Sum(B5:B35)” Double-tap on the cell you wrote the formula on. Once the formula is highlighted, copy and paste it on all white-colored cells directly under the metric’s name (on top of the Monthly Goal row).

	A	B	C	D	E	
1		Metric #1: Sales Revenue per Channel				Metric
2	Current Total	=SUM(B5:B35)				
3	Monthly Goal	3,380				
4	Date	Social Media	Email Marketing	Paid Ads	Organic Search	New
5	01/11/2024					
6	02/11/2024					
7	03/11/2024					
8	04/11/2024					
9	05/11/2024					
10	06/11/2024					
11	07/11/2024					
12	08/11/2024					
13	09/11/2024					
14	10/11/2024					
15	11/11/2024					

Note: If you are tracking a data point with a percentage, use the formula =Average(B5:B35).

Repeat this process throughout all of the columns. After completing the monthly goals for all data points, you should have something like this.

	A	B	C	D	E	F
1		Metric #1: Sales Revenue per Channel				Metric #2: New Product Sales & Pro
2	Current Total	0	0	0	0	0
3	Monthly Goal	3,380	2493	5000	1300	97
4	Date	Social Media	Email Marketing	Paid Ads	Organic Search	New Product Units Sold
5	01/11/2024					

Step 5: Create the dashboard charts

As mentioned, we'll keep our dashboard simple. The purpose of our dashboard will be just to see how the team is progressing toward a metric goal at a glance.

Each metric should have at least three types of charts in its dashboard:

#1: Scorecard chart (that shows the current total/average of a data point)

Social Media Current Revenue

1217

↓ -2,163

Steps to create this chart:

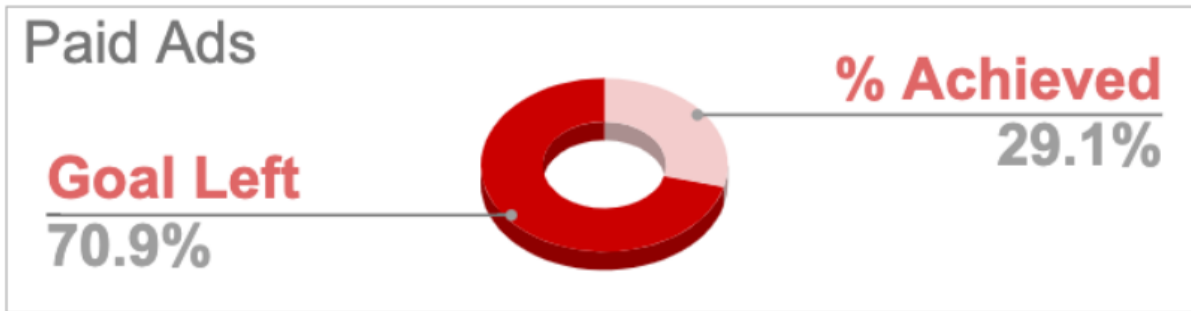
1. Select any of the numbers on the side of the Sheets
2. Click *Insert* on your top-left screen, then select *Chart*
3. Tap the “Chart type” dropdown menu, then choose *Scorecard Chart*
4. Under *Data Range*, type the number from the data point’s “Current Total” cell
5. Click the “Add Baseline Value”
6. Select the small 2x2 table on the side
7. Click the monthly goal value right below the Current Total cell you selected

	A	B	C
1		Metric #1: Sales Rev	
2	Current Total	0	0
3	Monthly Goal	3,380	2493

The scoreboard will initially appear as zero, but it'll automatically increase as team members input their weekly performance.

Tip: For now, drag the dashboard charts anywhere in your current Sheet. Later, we'll copy it to a separate page to serve as the official dashboard.

#2: Pie chart (to show the percentage of progress made towards the data point's monthly goal)



Steps to create this chart:

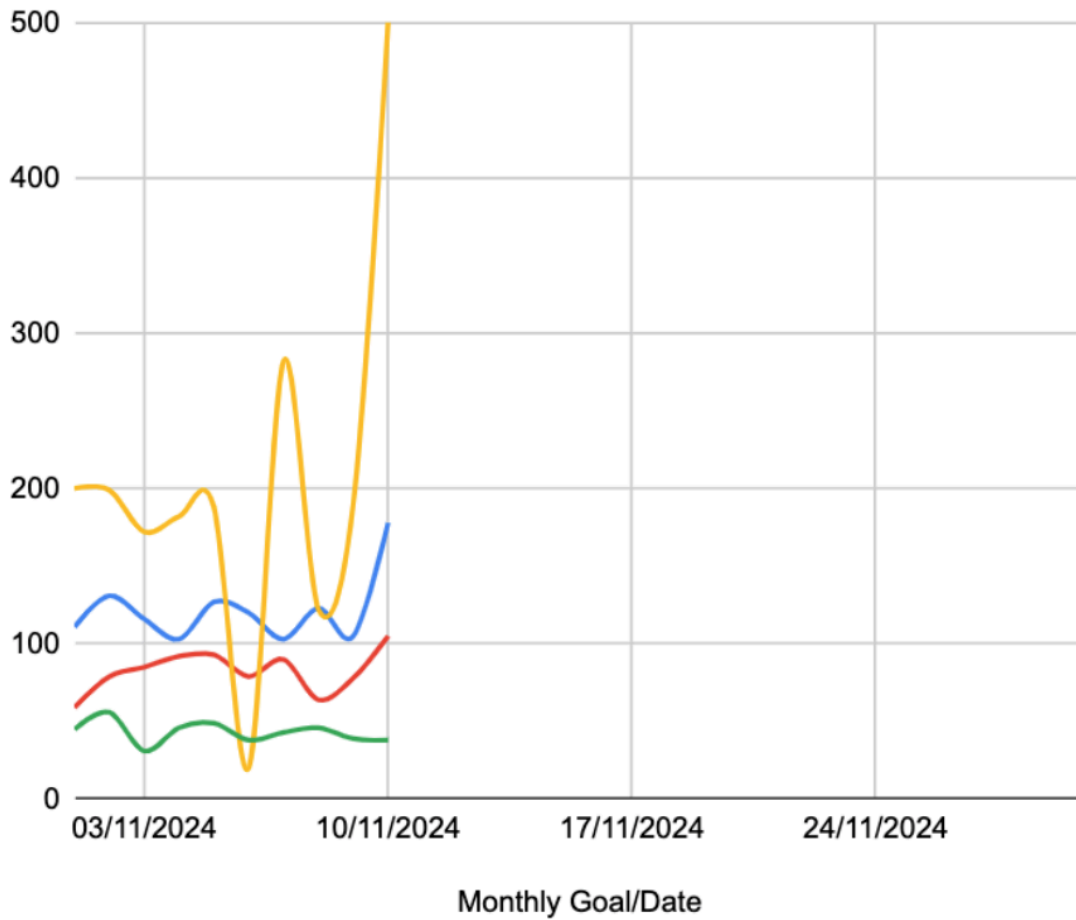
	A	B	C	D
1		Metric #1: Sales Revenue per		
2	Current Total	0	0	(
3	Monthly Goal	3,380	2493	50
4	Date	Social Media	Email Marketing	Paid
5	01/11/2024			
6	02/11/2024			
7	03/11/2024			
8	04/11/2024			

1. Highlight a data point's "Current Total" cell and the "Monthly Goal" cell. They should be on top of each other.
2. Tap *Insert*, then select *Chart*.
3. From the "Chart type," select *Doughnut Chart*. Customize and label the chart accordingly.
4. Set this chart aside on the Sheet temporarily.

#3: Line chart (to show daily progress)

Sales Revenue per Channel (Daily Progress)

— Social Media — Email Marketing — Paid Ads — Organic Search



Steps to create this chart:

		Metric #1: Sales Revenue per Channel				Metric #2: New Product Sales & Product Launch Conversion Rate	
2	Current Total	0	0	0	0	0	
3	Monthly Goal	3,380	2493	5000	1300	97	
4	Date	Social Media	Email Marketing	Paid Ads	Organic Search	New Product Units Sold	
5	01/11/2024						
6	02/11/2024						
7	03/11/2024						
8	04/11/2024						
9	05/11/2024						
10	06/11/2024						
11	07/11/2024						
12	08/11/2024						
13	09/11/2024						
14	10/11/2024						
15	11/11/2024						
16	12/11/2024						
17	13/11/2024						
18	14/11/2024						
19	15/11/2024						
20	16/11/2024						

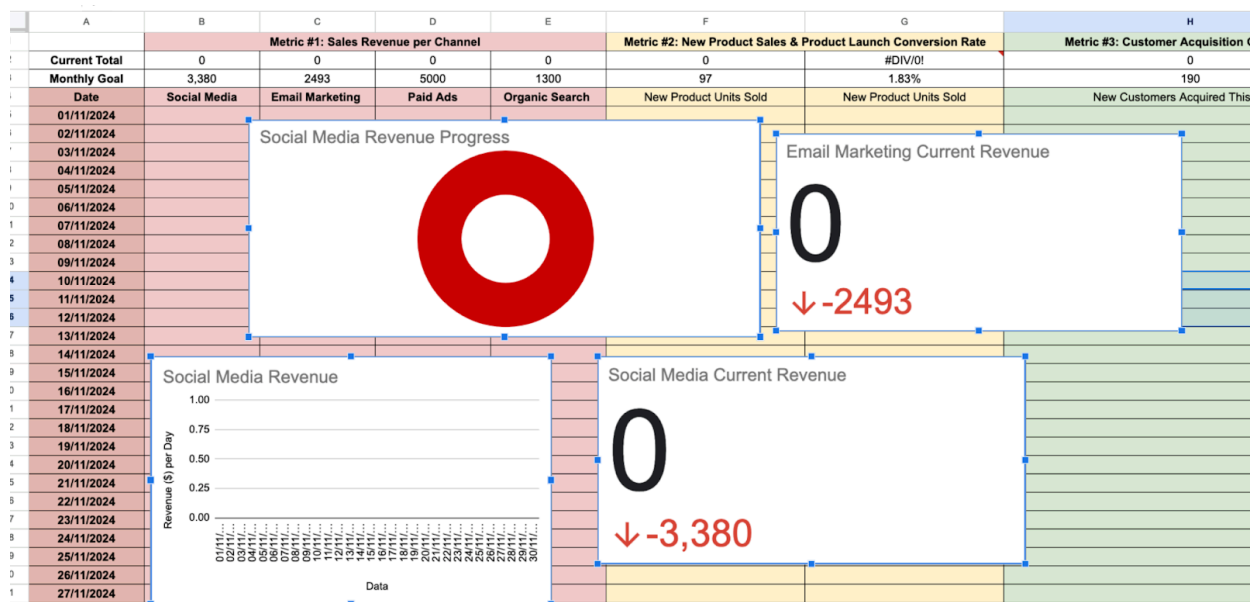
1. Highlight all the dates in your database.
2. Highlight all the cells beside the dates as well.
3. Tap *Insert*, and choose *Chart*. Under chart type, choose Smooth line chart.
4. Adjust/customize the chart as needed.

Step 6: Arrange the dashboard charts

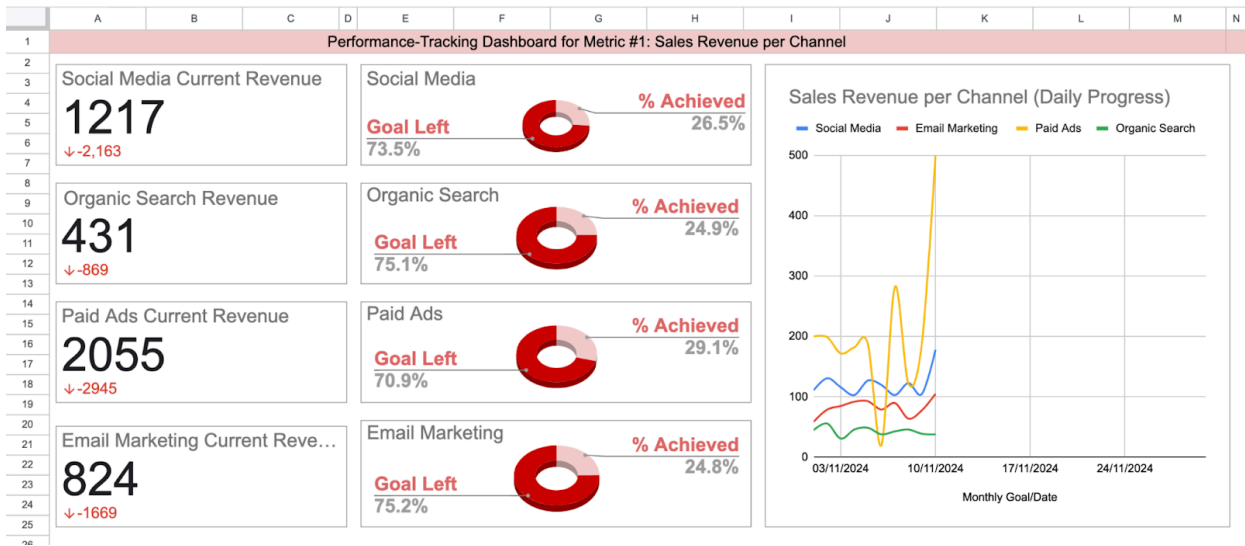
Time to arrange your messy charts!

Just copy and paste your new charts into a new Sheet that is empty and solely for creating a dashboard.

Go from having this:



To this, after copy and pasting:



Pretty cool, right?

Tip: It's best to use a unique Sheet for each metric. That way, you won't have to scroll endlessly to find what you need—especially if you're looking for, say, the 5th metric.

Step 7: Let employees fill out the template

	A	B	C	D	E	F	G	H
1			Metric #1: Sales Revenue per Channel			Metric #2: New Product Sales & Product Launch Conversion Rate		Metric #3: Customer Acquisition Growth Rate
2	Current Total	1217	824	2055	431	36	1.608	63
3	Monthly Goal	3380	2493	5000	1300	97	1.83%	190
4	Date	Social Media	Email Marketing	Paid Ads	Organic Search	New Product Units Sold	New Product Units Sold	New Customers Acquired This Period
5	01/11/2024	111	59	200	45	5	1.67	10
6	02/11/2024	131	79	199	56	2	1.52	5
7	03/11/2024	116	85	172	31	3	1.31	6
8	04/11/2024	103	92	182	46	1	1.58	8
9	05/11/2024	127	93	188	49	0	1.2	9
10	06/11/2024	120	79	20	38	10	1.7	3
11	07/11/2024	103	90	282	43	5	1.9	12
12	08/11/2024	123	64	122	46	3	1.9	5
13	09/11/2024	105	78	190	39	4	2.1	3
14	10/11/2024	178	105	500	38	3	1.2	2
15	11/11/2024							

Following the dates in Column A, instruct employees to input the daily values corresponding to the metrics they're responsible for.

For example, if I'm in the paid ads team, I must record in Column B how much revenue was earned through paid ads daily. Similarly, if I'm in charge of selling new products, it's my responsibility to log how many units were sold in Column F daily.

As all employees fill out the template, your dashboard will start taking shape and functioning like one. You'll be able to easily track the progress of each metric at just a glance.

Phase 6: Run effective restructuring communication meetings with stakeholders

A restructuring process without a proper restructuring communication plan is a recipe for disaster.

Changes are confusing. While your newly designed organizational structure may look neat and logical on paper, the employees themselves may not understand why and how their role fits into the restructuring plan.

That said, it's crucial to schedule regular restructuring communication meetings with your stakeholders.

Tip: We find that a bi-weekly meeting schedule during the restructuring period is often the golden balance—not too sparse, but not too frequent either. However, you also need to hold communication meetings both before and after the new organizational structure is put in place.

Pre-restructuring communication meetings

Pre-restructuring communication meetings usually involve only those responsible for planning the restructuring. These are key to making sure the restructuring process has a solid, actionable plan in place.

Topics to tackle during pre-restructuring communication meetings include:

- When and how employees will be informed
- Outlining the clear reasons behind the changes
- Choosing communication channels to bridge teams and leadership
- Brainstorming about what training support and resources are needed

During-restructuring communication meetings

These meetings should be open to all team members of your department.

The first meeting during restructuring is often an announcement that informs everyone about the overall goals and the impact of the restructuring.

After that, regular meetings should be held as progress updates to encourage two-way feedback within the team.

Early on, make sure to:

- Mention the reasons behind the restructuring
- Share the updated/new organizational structure
- Clarify responsibilities, roles, and hierarchy

- Address possible concerns about the process (e.g., layoffs, redundancy possibilities)
- Provide clear communication channels for employees who may need to ask or clarify any changes
- Emphasize support available for affected employees (e.g., counseling, career services)
- Reinforce the company's commitment to transparency throughout the process
- Clarify what metrics will guide performance expectations

As you work through the 90-day action plan, include:

- Progress reports on changes so far
- Open discussions for feedback and concerns
- Regular updates on timelines and milestones
- Details on new processes or tools that are being introduced
- Discussions of challenges and milestones achieved
- Clear communication pathways to submit suggestions or concerns
- Guidance on where to access mentorship or coaching for role transitions

Tip: Feel free to revise your 90-day action plan based on the valuable insights gained from these communication meetings

Post-restructuring communication meetings

After 90 days, when you've successfully achieved the goals you set for the department, you should still hold regular communication meetings.

These meetings will celebrate the success of the 90-day framework, help identify weaknesses in the team's current processes, and highlight potential changes needed for continued progress.

Key topics to talk about in post-restructuring communication meetings include:

- A review of the 90-day restructuring progress
- Addressing any ongoing concerns about the new structure
- Collecting feedback on the long-term effects of the 90-day plan
- Setting clear expectations for the future

Tip: Don't forget to celebrate the team's achievements and successes to keep morale high and motivate everyone!

Phase 7: Set up new accountability systems and workflows in your project management tool

As the last step toward success in your 90-day department turnaround framework, implement new accountability systems and workflows into your project management tool.

This will not only help the team smoothly transition into their roles but also give you a clear overview of who's meeting goals, who's facing challenges, and where adjustments may be needed.

Your new accountability systems must:

- Track progress on each task
- Identify potential delays and bottlenecks
- Provide real-time updates and effective communication
- Show what each team member is currently working on
- Support continuous feedback loop

Your 90-day action plan for each metric will be your handiest tool in building accountability systems.

They already have tasks with specific, quantifiable milestones outlined. So, all you need to do is input those tasks into your project management tool, assign employees to each task, and indicate when the tasks must be completed!

Here's an example of a simple yet effective accountability system on [Monday.com](#):

Task Management

Integrate Automate

Main Table

New task Search Person Filter Sort Hide Group by

Metric #5's To-Do List

	Task		Owner	Status	Due date	Priority	Notes	
☐	Create channel-specific content strategi	+	Emily	Done	✓ Nov-14	Medium		
☐	Implement marketing automation workflows.	🔔	Emily	Working on it	○ Nov 24	Low		
☐	Set up advanced tracking and reporting.	🔔	Sarah Michael	Done	✓ Nov-24	Low		
☐	Develop A/B testing framework.	+	Sarah Emily	Stuck	○ Nov 24	Critical ⚠	Training in Progress	
☐	Implement conversion rate optimization strategies.	+	Emily	Working on it	○ Dec 1	High		
☐	Optimize customer journey touchpoints.	🔔	Emily	Working on it	○ Dec 1	Low		
☐	Enhance retargeting campaigns.	+	Sarah	Not Started	○ Dec 1	Low		
☐	Scale successful channel initiatives.	+	Sarah	Not Started	○ Dec 8	Low		
☐	Optimize bidding strategies.	🔔	Emily	Not Started	○ Dec 8	Low		
☐	Expand successful audience segments.	+	Emily	Not Started	○ Dec 8	Low		
☐	+ Add task							

Emily +2

Nov 14 - Dec 8

Completed Tasks (All Metrics)

2 Tasks

Owner	Status	Due date	Priority
Sarah		Nov 12 - 13	

Using [Monday.com](#), you can create a similar-looking accountability system in just minutes.

And yes—it's as simple to use as it looks!

Just instruct each team member to enter their weekly tasks (from the 90-day action plan and any new ones that arise) into the system and update the accountability system as required.

Most project management tools will let you track the progress for each metric in one dashboard.

Example:

Task Management ▾ Integrate 

[Main Table](#) +

New task ▾ 🔍 Search 👤 Person ⚙ Filter ▾ ⬆️ Sort ⚙ Hide 📁 Group by ...

> Metric #2's To-Do List 8 Tasks	Owner Olivia +2	Status 	Due date Nov 10 - 24	Priority 	
> Metric #4's To-Do List 10 Tasks	Owner Olivia +2	Status 	Due date Nov 2 - Dec 1	Priority 	
> Metric #5's To-Do List 10 Tasks	Owner Emily +2	Status 	Due date Nov 14 - Dec 8	Priority 	
> Completed Tasks (All Metrics) 2 Tasks	Owner Sarah	Status 	Due date Nov 12 - 13	Priority 	

Note: Make sure employees are completing all required quantifiable goals for each task before marking an entry as completed. When necessary, be ready to step in if someone is struggling with a task or could use a little extra support!

Throughout the 90 days, maintain a consistent back-and-forth between the performance-tracking dashboard and the newly set-up accountability system. This will help you spot and address mistakes early, ensuring that everything and everyone stays on track.

[Get 40+ more playbooks like this at Bottleneck Breakers](#)