

From *Good Idea* to Successful Rollout

Before you execute, slow down long enough to think it through. This framework ensures your team has clarity, alignment, and a real plan — not just enthusiasm.

DATE

IDEA

Ideas are everywhere. Implementation is everything. Most ideas don't fail because they were bad ideas. They fail because no one slowed down long enough to answer the right questions before the momentum wore off. This document is your forcing function.

PHASE 1 · THE IDEA | START HERE

1 NAME THE IDEA

State it in one sentence. If you can't, it's not ready.

WHY ARE WE DOING THIS?

What broke, what opportunity appeared, what pain are we solving?

2 STRATEGIC FILTER

Check all that apply. If you can't check one, stop and ask why.

- ☐ **Acquisition** — Get more customers
- ☐ **Ascension** — Make customers worth more
- ☐ **Retention** — Keep customers longer
- ☐ **Efficiency** — Save time / reduce friction
- ☐ **Profitability** — Reduce cost / improve margin

HOW DOES THIS MOVE THE NEEDLE?

PHASE 2 · CLARITY | DEFINE IT

3 CLEAR OUTCOMES — WHAT DOES "WIN" LOOK LIKE?

What specifically changes? What will you see, hear, or measure when this works?

BEST CASE

MINIMUM WIN

4 NATURE OF THIS IDEA

☐	☐	☐
Permanent Change	Bridge / Temp	Experiment / Test

IF EXPERIMENT — TEST WINDOW?

IF BRIDGE — BRIDGING TO WHAT?

CURRENT OPEN PROJECTS — WHAT'S ALREADY RUNNING?

Organizations die from indigestion, not starvation of ideas.

PROJECT NAME

OWNER

STATUS

5 PRIORITY FIT — WHERE DOES THIS LIVE?

Where does this fit in your Clarity Organizer? Does it bump something already committed?

☐	☐	☐
3-Year Vision	1-Year Objectives	90-Day Priorities

DOES THIS REPLACE OR BUMP SOMETHING ALREADY SET?

WHAT GETS DEPRIORITIZED TO MAKE ROOM?

6 RESOURCE ALLOCATION

What are we committing? The third one gets overlooked most.

 Time/Capacity	 Budget/Money	 Mental Energy
Hours per week, team bandwidth	Estimated cost, tools, spend	Bandwidth & attention load

PHASE 4 · PEOPLE & COMMUNICATION

7 WHO OWNS IT?

One name. Not a team. Not "everyone."
One person accountable.

SINGLE OWNER

WHO IS INVOLVED / SUPPORTING?

8 WHO NEEDS TO KNOW?

Separate doing from knowing. Not everyone informed has to act.

DOING

INFORMED

9 COMMUNICATION PLAN

How does everyone find out? When?
What questions will they ask?

HOW / WHEN ANNOUNCED

TOP 3 QUESTIONS THEY'LL ASK

10 TIMELINE

D Decision Made

K Kickoff / Launch

R First Review

E Full Eval / End

KEY MILESTONES

HOW WE'RE MEASURING PROGRESS

• WHAT COULD GO WRONG? List the realistic risks, not the paranoid ones.	• WORST CASE SCENARIO If this fails badly — what happens? Can we live with it?
• WHAT WOULD MAKE THIS DIE ON THE VINE? No follow-through? Wrong owner? No time allocated?	• WHAT DOES IT LOOK LIKE IF IT ALL GOES RIGHT? Paint the picture. Make people want to earn this outcome.

11 SINGLE SOURCE OF TRUTH

Where does this document live? One place. All updates, decisions, and notes go here.

DOCUMENT LOCATION / LINK

REVIEW CADENCE

NEXT REVIEW DATE

☐ Full Go — we're doing this	☐ Experiment — limited test	☐ Not Now — parking lot
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