

Quarterly Action Plan for: Q1, 20XX

Focus Area One:	Action Steps/Mile Stones	Who	By When
Lead Generation: Getting more people in the door!	<input type="checkbox"/> Lay out current system and tracking to see what historic performance reveals. Use insights in next action step to pick tactics to increase store visitors.	John	1/15/XX
Criteria of Success: <ul style="list-style-type: none"> • Have a baseline scorecard in place that tracks daily traffic through store. • Decided on the top 2 marketing ideas to implement for Q1 and implement them (with simple metrics to track results). Rough system laid out for each. 	<input type="checkbox"/> Conduct "Sweet Spot" Analysis and choose the top 2 marketing ideas to implement in Q1. Rough out plan to implement and systematize each.	John	1/31/XX
	<input type="checkbox"/> Create a draft "Marketing Scorecard" to use to track daily key marketing numbers (and store sales by one breakdown.)	John	1/31/XX
	<input type="checkbox"/> Checkpoint 1: How is KPI going? Review how implementation of 2 new tactics going. What is working well? What simple tweaks should we make?	John	2/28/XX
	<input type="checkbox"/> Review status at end of quarter and then refine next steps for Q2 based on where we stand.	John	3/21/XX
KPI: # of Qualified Visitors to Store per Day			

Focus Area Two:	Action Steps/Mile Stones	Who	By When
Begin to systematize the "sales associate" customer service role of our business.	<input type="checkbox"/> Brainstorm all the "sales associate" systems we think we'll eventually want for our sales associates, from hiring, to training, to doing the sales associate role on the showroom floor. Prioritize this list & pick the top 2 pieces to create in Q1.	Sarah	1/15/XX
Criteria of Success: <ul style="list-style-type: none"> • Have an outline of the "working with customer" sales associate part of our business (we'll flesh out these systems over Q2 and Q3). • Have chosen and built out version one of the 2 most important front desk systems. 	<input type="checkbox"/> Have system one completed and trained team on its use.	Sarah	2/7/XX
	<input type="checkbox"/> Checkpoint: How is system working? What is going well? What refinements need to be made? What training adjustments are needed? Lay out key action steps.	Sarah	2/28/XX
	<input type="checkbox"/> Have 2nd system built and team trained to use. (Checkpoint to review and refine in early Q2.)	Sarah	3/15/XX
	<input type="checkbox"/> Review list of "sales associate" systems needed. Decide on next 2-3 most important systems to build and implement. Rough out a plan to do this for Q2.	Sarah	3/30/XX
KPI: % Completed (estimate)			

Focus Area Three:	Action Steps/Mile Stones	Who	By When
Hiring process for new sales associates.	<input type="checkbox"/> Create draft of job description and help wanted ad. Review both with Pam. Revise based on her input.	Sarah	2/15/XX
Criteria of Success: <ul style="list-style-type: none"> • Have a written job description and help wanted ad • Written outline of interview process and key questions and qualifications. • Written outline of a "new hire" orientation process to follow. 	<input type="checkbox"/> Create draft of interview process, key questions to ask, and the 3-5 "must have" qualifications to hire. Review draft with Pam and revise based on her input.	Sarah	3/7/XX
	<input type="checkbox"/> Create draft outline of new hire orientation process. Review with Pam and revise based on her input.	Sarah	3/21/XX
	<input type="checkbox"/> Create 1-2 page "new hire checklist" of above steps from job ad posting through hire and first 30 days of orientation.	Sarah	3/30/XX