

Executive Priorities Project Management/Tracking Document

Priority Item	Details	Rank	Owner	Meeting Forum	Next Steps
Improve Capabilities	Solve for gaps in expertise, systems constraints, and technology capacity issues.	1	Monty	Series necessary? Scorecard?	Schedule meeting with Tech team to assess capabilities (CoS task).
Launch New Brand Campaign	Build out business cases, full story for the announcement, and iron out all go-to-market (G2M) details.	1	Monty & Team	Daily Launch Readiness Sessions	Hold daily sessions; PR launch on 3/4; Sales launch on 3/22.
Sales Renewals	Renew prior cancels; review at weekly performance sessions.	1	Hitchcock	Weekly session	CoS to double-check invite list with EA for renewal sessions.
Cross-Company Partnership	Consumer Partnership – currently on hold, nothing pressing right now.	2	Monty	N/A	CoS to join 2/24 President & Consumer call, track, and provide updates.
Sales Growth Arc	Multi-quarter sales growth planning and strategy.	2	CoS	Bi-weekly Strategy Sessions	Align long-term plan/structure to meet growth commitments.
Sales Pricing w/ Bain	Continuous Improvement topic focused on pricing strategy with Bain partnership.	2	Hitchcock & Bain	Monthly Sessions	CoS to work with EA to schedule monthly sessions.
Marketing Evolution	Focus on digital commerce and advertising evolution.	3	Ally	TBD	TBD
Sales Team Hiring/Turnover	Increase hiring rates and reduce turnover.	3	TBD	TBD	CoS to set up time with Jana from HR to develop the plan.

Follow-Up Questions for Next Meeting with the President

1. For Improve Capabilities, would you prefer a scorecard or a weekly summary for reporting?
2. What should the structure of the Multi-Quarter Sales Growth Arc strategy session look like? Are there specific assets or research materials we should focus on?
3. For the Sales Renewals weekly review, do we need to make any adjustments to the invite list or format?
4. What is your preferred level of involvement in the Sales Pricing with Bain sessions? Should we be reporting back specific progress bi-weekly or monthly?
5. Any additional input needed for the Marketing Evolution project at this stage?
6. Regarding Sales Team Hiring and Turnover, what kind of recruiting improvements do you want to prioritize?

Personal (CoS) Follow-Up Items

1. Schedule a meeting with the Tech team to assess the capabilities for the Improve Capabilities priority.
2. Double-check the invite list for Sales Renewals sessions with Sam's EA (Hal).
3. Join the 2/24 President & Consumer call for the Cross-Company Partnership and track progress.
4. Work with EA to schedule monthly sessions for Sales Pricing with Bain.
5. Set up a meeting with Jana from HR to discuss the current state of Sales Team Hiring and turnover reduction strategies.
6. Develop a reporting structure for the Multi-Quarter Sales Growth Arc and align with the long-term plan.

(cont)

Go-Forward Summary Plan for Managing the President's Priorities

- Centralized Document: I will maintain this priority document, ensuring it is updated weekly with progress, owners, and any upcoming meeting forums. The document will be housed in our shared executive folder for full visibility.
- Weekly Check-ins: I will set up brief check-in meetings with the President every Monday morning to go over the status of these priority items. This will allow us to stay aligned and adapt as needed.
- Monthly Leadership Meeting: I will lead a monthly meeting specifically to review all the President's priorities, bringing together the owners of each initiative to discuss updates, blockers, and next steps.
- Communication: I will send a weekly email summary to the President and leadership team, highlighting progress, challenges, and any actions that need to be taken on the President's priorities.
- Real-Time Updates: If necessary, I will provide real-time updates on any high-priority items during the daily leadership stand-up.