JEFF SHANNON FACILITATION

PRIORITY PLANNING GUIDE FOR DRIVERS

LEAD YOUR PRIORITY

You put your name next to a Sacred 5 Priority or a 90-day action. This guide is how you turn that name into a plan, a team, and a result, without waiting for anyone to hand you a process.

WHAT A DRIVER DOES *one person, one priority, four jobs*

1. **Own the outcome, not every task.**
   You are accountable for the result. Other people will do most of the work. Your job is to make the work clear, keep it moving, and say early when it is not.

2. **Write the one-page plan.**
   Page 2 is the plan. Build it with the people who will do the work, in your first working session. If it does not fit on one page, it is too complicated.

3. **Run the two-week check-in.**
   Twenty minutes, same agenda every time. Page 4 has the agenda and the questions. You do not need permission to start it.

4. **Report in one sentence.**
   On track, at risk, or stuck. Whoever asks, whenever they ask. Stuck gets said the week it happens, with what you need to get unstuck.

BEFORE THE FIRST SESSION *thirty minutes of your own prep*

Pull the poster photo for your priority or action. Write, in your own words, the one thing this priority must change by year end and how you would know it happened. That is your draft objective and measurable goal. Bring it as a draft, not a decision. The session improves it.

Then invite three to six people: the ones who will do the work, plus one person who will feel the result (a customer-facing colleague, a frontline manager, someone from another department). Send the one-page plan blank with the invite so nobody arrives with a deck.

Hold the specific strategic choices until the host shares the final plan and the aligned talking points. Your first session can build the priority plan without broadcasting the whole strategy.

FILL THIS IN TOGETHER

One page, no more. Six parts: the priority, the objective, the measurable goal, three sub-objectives, one key result and one driver for each, and three actions under each. Draw it on a flipchart in the session, then copy it here.

PRIORITY

The Sacred 5 Priority or 90-day action, as written on the poster

MAIN OBJECTIVE

What this priority must change. One sentence, a verb at the front.

MEASURABLE GOAL

How we will know it happened. A number and a date.

SUB-OBJECTIVE 1

KEY RESULT

DRIVER

SUB-OBJECTIVE 2

KEY RESULT

DRIVER

SUB-OBJECTIVE 3

KEY RESULT

DRIVER

THREE ACTIONS

Verb first. Owner. Date.

THREE ACTIONS

Verb first. Owner. Date.

THREE ACTIONS

Verb first. Owner. Date.

WHAT WE WILL STOP OR NARROW TO MAKE ROOM

OUR CHECK-IN

Day, time, every two weeks. First date:

THE FIRST WORKING SESSION

SIXTY MINUTES, ONE PAGE

You leave with the one-page plan filled in, every action owned, and the next check-in on the calendar. Stand up. Use a flipchart. No slides.

5 min — **Why this priority**

Read the priority as written on the poster. Say in one minute why the team chose it and what it protects. Then stop talking.

10 min — **The objective and the goal**

Put your draft on the wall. Ask: is this the change that matters most? How would a customer or a frontline colleague know it happened? Rewrite until one sentence and one number remain.

15 min — **Three sub-objectives**

Everyone writes on sticky notes: what has to be true for the goal to happen? Cluster. Pick three. If you have five, you have two to drop. Name a driver for each, out loud, with a yes from that person.

15 min — **Three actions each**

Each driver drafts three actions for their sub-objective. Verb first, owner, date within the quarter. Read them back to the room. Vague actions get rewritten before they get written down.

10 min — **What gets in the way**

Two questions: what are we doing today that competes with this for time? What decision does someone above us need to make for this to work? Write both down. You will carry them up.

5 min — **Next**

Put the two-week check-in on every calendar before anyone leaves. Photograph the flipchart. Send the one-page plan within a day.

SESSION RULES

DO

- Keep it to one page and sixty minutes.
- Let the people who do the work write the actions.
- End with every action owned and dated.
- Capture the obstacles and the decisions you need from above.

DO NOT

- Reopen the strategy. The choice was made in the room.
- Accept an action without a verb, an owner, and a date.
- Let one person own everything, especially you.
- Leave without the next date on the calendar.

KEEP IT MOVING

THE TWO-WEEK CHECK-IN

Twenty minutes, same agenda every time, with the drivers of your sub-objectives. If it needs slides, it has become a project review. Reset it.

3 min — **Where we are**

Each driver, one sentence per sub-objective: on track, at risk, or stuck.

7 min — **What changed**

One thing each person noticed since last time that the plan should know about. Customers, competitors, the organization.

7 min — **What is in the way**

Name the obstacle behind every at-risk or stuck item. One next step, one owner, before you move on.

3 min — **Next**

Confirm the next date. Note what you need to carry up to your leader.

KEY DISCUSSION QUESTIONS

- What did we do in the last two weeks that moved the goal? What did we do that did not?
- Which action is the one that, if it slips, takes the goal with it?
- What are we doing that competes with this priority for time? Stop it, narrow it, or hand it off?
- What decision are we avoiding because the answer creates work or conflict?
- Who needs to know what we are doing, and who has heard it from us?
- Is the goal still the right goal, or has the work taught us something?

HOW TO REPORT

- **On track.** Say so and stop.
- **At risk.** What is slipping, what you are doing about it, when you will know if it worked.
- **Stuck.** What is blocking it, what you need, from whom. Say it the week it happens.

FIVE WAYS PRIORITIES DIE

- The plan lives in the driver's head, not on one page.
- The check-in slips twice and never comes back.
- Actions have no owner, so everyone owns them.
- Nothing gets stopped to make room.
- Stuck stays quiet until the quarter is gone.

Does the decision I am about to make get us closer to the summit, or further from it?

Print the final plan when it arrives and carry it. Every request that lands on your priority gets this question first.

OWN THE OUTCOME.
KEEP IT MOVING.

© 2026 JEFF SHANNON FACILITATION