



Roadmap To Success Checklist

Note: The purpose of a roadmap is to guide employees and teams to their best path to success based upon planning, research, best practices, objectives and the final goal. A roadmap allows everyone to understand the path, expectations, and be in alignment on the process. It also allows for adjustments when roadblocks occur, that an alternate route can be determined with an understanding on where to re-engage back on the roadmap.

Items to gather when building a roadmap to success:

- Company's Values & Principles
- Company's Mission, Vision
- Strategic Plan & Initiative that roadmap is a part of.
- List of leaders needed to be involved in planning roadmap.
- List of other employees needed to be involved in planning roadmap.
- List of what individuals or teams roadmap is for.
- Research on subject from past and / or from subject matter expert.
- Best practices from current employee success.

Steps in building a roadmap to success (With chosen leaders and employee participants):

- Have team review research and best practices.
- Define objective and end goal and gain feedback and insight from leaders and other employees.
- Does objective and goal align with Mission, Vision and Values.
- Assess and define starting point of roadmap.
- Assess and define timeline for accomplishment.
- Assess what would be the milestones based upon starting and ending goal – build in timelines of each milestone.
- Define the measurements of each milestones and make SMART Goals (Specific, Measurable, Achievable, Relevant, and Time-Bound).
- Build in evaluation and assessment process tied to specific individuals and dates.
- Educate all, gain feedback and make final adjustments and additions. (Leadership is a molder of consensus not a builder of)

Final Checklist / Review:

- Did I research properly?
- Did I involve others?
- Do I have milestones?
- Did we define and create SMART Goals?
- Did we define and build in an evaluation process?
- Am I prepared to make adjustments?
- Does everything point back to our values and principles?