

# ChiefAIOfficer.com Ignition Guide

## PREPARING FOR YOUR IGNITION EVENT

### Attendee Homework

Two weeks before your Ignition date, assign market research tasks as described in the Marketing Strategy module. For example:

- Customer Service channels
- Social Media
- Online Review

The day before, all participants should read the handouts on the elements of Ignition (as found in course downloads):

- Vision
- Core Values
- Marketing Strategy
- BHAG
- Mid-Range Planning
- Living in a 90-Day World
- Meeting Rhythm

### Supplies

- Print enough copies of the high-level agenda to hand one out to every attendee. The detailed bullets below each agenda item are for you as the facilitator.
- Whiteboard
- Dry-erase markers & eraser
- Camera to take pictures of the work on the whiteboard. Your phone is fine for this.  
*Pro Tip:* Have two different people take clear photographs of the whiteboard at every stage of the Ignition process.
- Pens & note pads for each attendee.
- A large TV or screen to screencast to, as well as any cables or chargers you'll need.
- Plenty of water or tea (you'll be doing a lot of talking).
- Optional: Use the CAIO Co-Pilot app to record & transcribe the conversation.
- Optional: Easel-size post-its would get used if you brought them.

## Location & Services

*Note:* Sessions should ideally be in person.

Whiteboards are your best friend during the Ignition event. Make sure the space you use has at least one large whiteboard available. An easel and large post-its will be helpful for anything you may want to refer back to (like the Parking Lot. See below). Have plenty of marker colors on hand.

For businesses with physical locations, Ignition should take place off-site. Hotel and day rental of co-working conference rooms work well for larger groups and when people are traveling to participate.

Plan the catering, and prepare the leadership team to work through lunch. Having food brought in keeps the team close by and in the right headspace. Decide on any meals ahead of time. If you provide people with individual options, give them the menu before the session so that session time isn't interrupted while people decide what to eat.

Be sure to have plenty of snacks, coffee, and water available for the leadership team throughout both days.

If you meet virtually, use an online whiteboard and mind map tool like Miro or LucidChart.

We recommend also requiring cameras to be on.

## Parking Lot

The parking lot is where you note any topics that come up during the session but are not on the agenda.

Things will come up that will be tangential. Putting those items in the parking lot lets the person bringing them up know that you will address the issue while keeping everyone on-task.

Items are not to be taken off the parking lot until there is a resolution to the issue. What is the action item that needs to take place?

## Ice Breakers

Consider using icebreaker exercises at the start of the day, during lunch, or when energy is fading. Tools like Thumball and Reflection Cards can make this fun and engaging.

This helps ensure that the people in the room are present, not checking email.

## **IGNITION AGENDA**

### DAY 1

9:00: Welcome and Introduction (15 minutes)

- Intro yourself
- What is a CAIO
- Who's in the room
  - All attendees introduce themselves with their name, role, and any other interesting or relevant information (how long have they been at the organization, where are they from, depending on the niche and goals of the CAIO), as well as their expectations for the day.
  - CAIO writes expectations on a whiteboard as intros happen

9:15: Why we're here (15 minutes) - get buy-in that they can't grow without you

- Growth without strategy is accidental
- Avoid growing to death
- Rowboat analogy

9:30: Core Purpose (45 minutes)

- 5 Whys
  - Why does this business exist?
  - Why does that matter?
  - Why does that matter?
  - Why does that matter?
  - Why does that matter?
  - Gut punch

10:15: Break (15 minutes)



### 10:30: Core Values (90 minutes)

- Note that we start with the big picture: who we are, what we do, where we're going, before getting more granular
  
- Objectives:
  - Create a clear understanding of the power of Core Values
  - Discover their Core Values
    - Step 1 - Have each member list three people who, if you could clone them, would lead you to market domination, OR If a new business, everyone makes a list of the three people who have most influenced their lives in a positive way
    - Step 2 - Go over the names and list the 3-5 characteristics that those people embody (list on whiteboard)
    - Step 3 - Narrow it down (keep, kill, combine). The goal is 5-15
    - Step 4 - Decide which values belong and are truly core. The goal is 3-7.

### 12:00: Working Lunch (45 minutes) - Check in with the group regarding the Four Ps:

- Process - How do they feel about the approach being used?
- Progress - Do they see benefits to the exercises so far?
- Pace - Are you going at a comfortable pace? Or do they want to slow down/speed up?
- People - How's everyone feeling physically? Are they tired? Energized?

### 12:45: BHAG (45 minutes)

- Determine the timeframe (likely somewhere between 10 and 25 years)
- Determine larger than life goal everyone is working towards

### 1:30: Marketing Strategy (90 minutes plus 15 minute break)

- Objective:
  - 100% on the same page with who our ideal client is and what we should be saying to them:
    - Who are we selling to?
      - Team members share what they discovered about the customer avatar in their market research in preparation for Ignition
      - Complete client avatar profile as a team



- What are we selling them?
  - Team members share what they discovered about customer satisfaction and company profitability with current products
  - Discuss which products or services should be prioritized and whether any should be considered for discontinuation

\*Break for 15 minutes\*

- What makes us different from our competitors?
  - Determine the Three Uniques

3:15: 5-10 Year Plan (45 minutes)

- 3-5 targets to accomplish within the determined timeframe

4:00 Wrap up

- Summarize what we accomplished
- What to expect tomorrow
- Answer questions

DAY 2

9:00: Welcome (30 minutes)

- Reminder of what was accomplished yesterday
- Introduce the parking lot
- Answer questions/concerns that came up overnight

9:30 Three-Year Plan (45 minutes)

- Objective:
  - Clear picture of what the organization will look like in 3 years
  - Consider who, what, where, tech, expenses, revenue, client numbers, anything relevant to the business and meeting the BHAG

10:15: One-Year Plan (60 mins)

- Objective:
  - 100% on the same page with what must get done this year to be on track with the 3-Year Plan

11:15 Break (15 minutes)



11:30: Quarterly Rocks (60 mins)

- Objective:
  - 3 to 7 (3 is best) significant projects that we need to get done in the next 90 days
  - Who will own them?

12:00: Working Lunch (45 minutes)

- Finish anything that you may have fallen behind on in the agenda
- Answer questions
- Check in on the Four Ps

12:45: Meeting Rhythm (45 minutes)

- Objective:
  - Introduce the concept of a meeting rhythm
  - Schedule the next quarterly planning session
  - Schedule weekly and monthly meeting cadence

1:30: Parking Lot (2.5 hours with break mid-way)

- Objective:
  - Work through any issues/opportunities/updates that came up during planning that wasn't specifically on the agenda.
  - Identify the next step toward resolution for anything that is not quickly resolved on the spot.
  - Assign and document those next steps.
  - The resolution might be to make something either a company or departmental rock or to keep it in the parking lot to revisit at the next quarterly planning session.

4:00: Wrap up (45 mins)

- Identify any information that needs to be shared with the rest of the organization.
  - Who will deliver the information and when?
- What additional questions or feedback do people have about Ignition and what's to come?
- Go around the room answering the question, "Were your expectations met?"