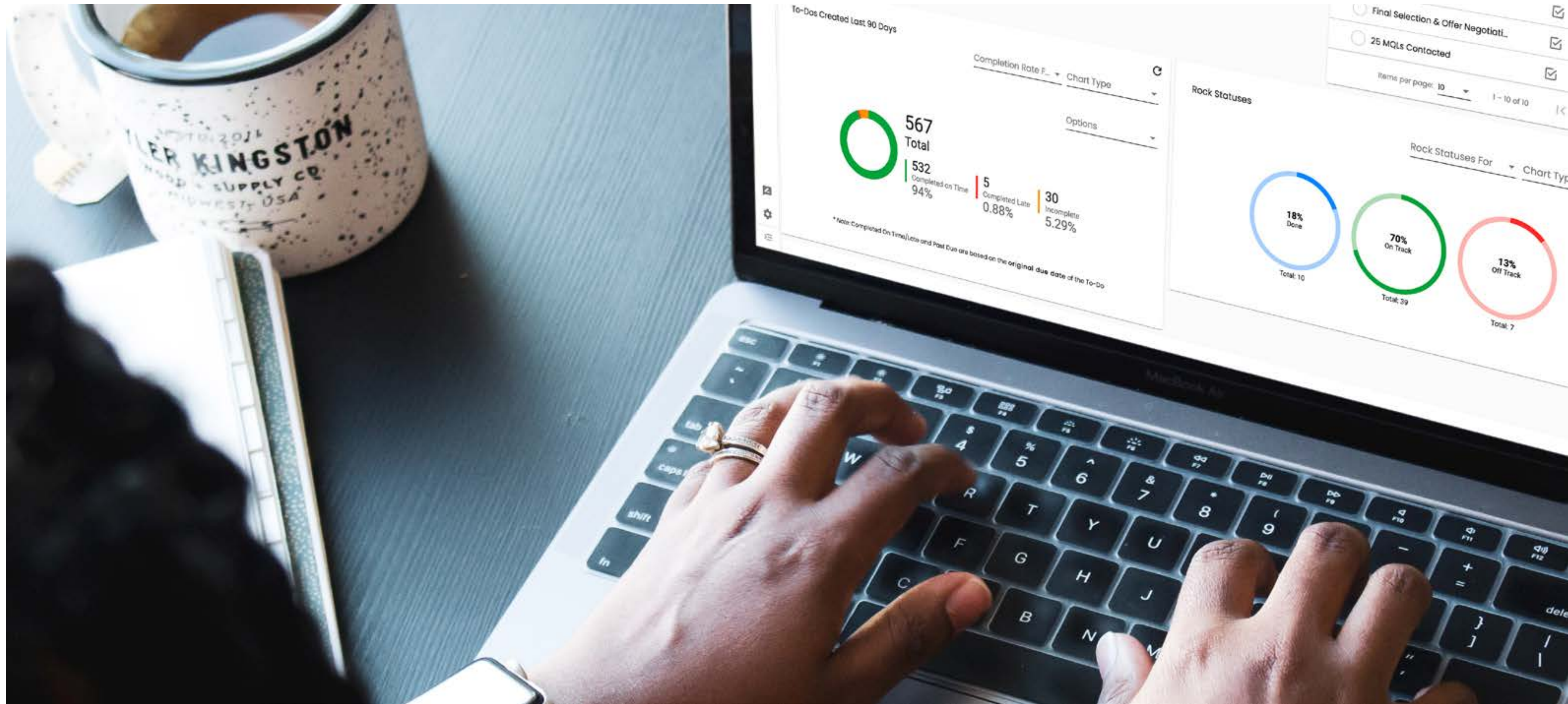# Getting Up and Running On Ninety

INTEGRATE YOUR ORGANIZATION IN THREE STEPS

By Mark Abbott, Zack Swire, and Tommy Mains | April 2023 | Ninety

A Message from the CEO

Every organization runs on some kind of system. As a business grows and evolves into a company, and a company evolves into a great company, so should its operating system.

At Ninety, we understand the challenges of building, running, and scaling organizations. Our mission is to make that work easier by providing a cloud-based platform with the essential concepts, tools, and disciplines leaders need to upgrade their operating systems.

We believe we're moving into a new Age of Work — the Age of Understanding, or Work 8.0. The coming of this age was inevitable, but the pandemic accelerated its arrival by about ten years as so many organizations transitioned to remote or hybrid models.

With access to a wider array of opportunities than ever before, people don't just want to punch a time clock — they want to find value and purpose in their lives through Work they love doing (which we refer to as Work with a capital W).

This guide is all about how to master a particular concept, tool, or discipline needed to build a great company in this new Age of Work. Great organizations know who they are, what they are, where they are, where they want to go, and what it's going to take to get there.

Our relentless focus is to simplify the hard work of aligning and focusing teams so organizations and their employees can thrive. We're glad you're joining us on this journey. If you have questions or want to learn more, reach out to helpful@ninety.io — we'd love to hear from you.

Gratefully,

Mark Abbott
CEO + Founder, Ninety

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This Ninety Guide is part of a series designed to help you become a pro at building, running, and scaling your organization on Ninety.

This guide addresses getting up and running on Ninety, our powerful and simple software-as-a-service (SaaS) platform that supports many of the world's leading [business operating systems (BOSs)](#).

The term BOS might be entirely new to you. That's okay. We'll explain more as we go. The important thing to know is that every company has a BOS — an established way it operates. Ninety is designed to help upgrade your BOS and harness the power of a fully integrated BOS platform.

The Ninety platform helps you master both the art and science of building, running, and scaling your business. We'd love to share with you what we've learned from helping thousands of organizations focus, align, and thrive.

Like anything great in life, upgrading how you operate your organization requires a courageous first step and committed follow-through to reap the benefits. If you genuinely want to build a great company, we promise, you'll be glad you chose Ninety for your business, your life, and your people.

LET'S DIVE IN.

- **Read it**

  » We've designed this guide to make it easy to quickly absorb the information. Skim for highlights, glance for big ideas, or dive in for a deeper understanding.

- **Save it**

  » Continue to use this guide as a high-value reference. Highlight, underline, or circle what's most useful. We've even left space for notes.

- **Share it**

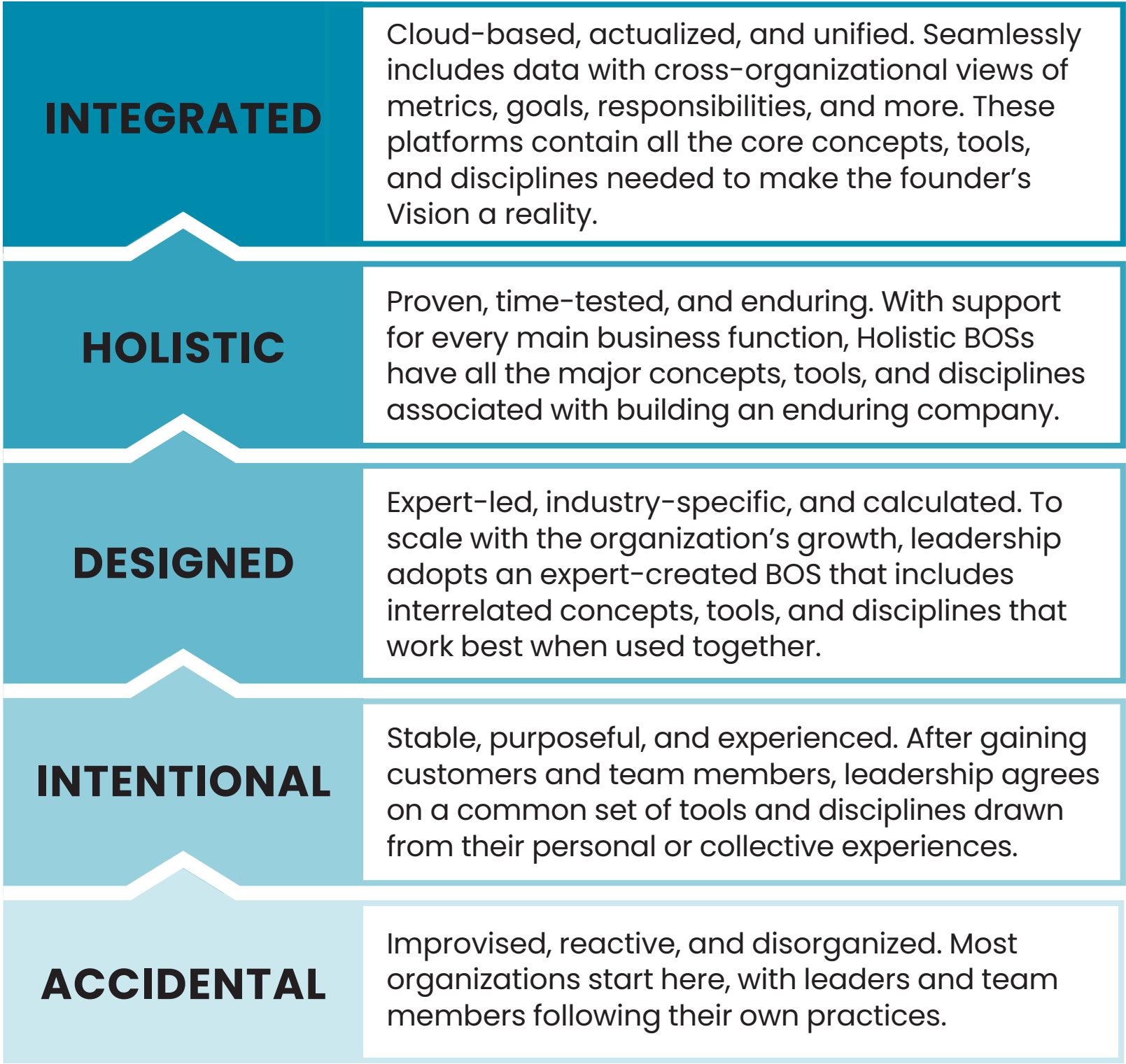 » The information and advice on these pages should be shared. We deeply believe that useful resources should be accessible to all.

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Table of Contents

Every organization runs on an operating system. The more advanced versions consist of a collection of concepts, tools, and disciplines that help its members set goals, solve problems, make thoughtful choices, take action, create a thriving culture, monitor progress, and more. These systems are called business operating systems (BOSs). We've been studying them for decades to distill their wisdom, build best-in-class tools, and discover the best practices for building, running, and scaling a great company.

Our research shows that there are five levels of BOSs:

INTEGRATED	Cloud-based, actualized, and unified. Seamlessly includes data with cross-organizational views of metrics, goals, responsibilities, and more. These platforms contain all the core concepts, tools, and disciplines needed to make the founder's Vision a reality.
HOLISTIC	Proven, time-tested, and enduring. With support for every main business function, Holistic BOSs have all the major concepts, tools, and disciplines associated with building an enduring company.
DESIGNED	Expert-led, industry-specific, and calculated. To scale with the organization's growth, leadership adopts an expert-created BOS that includes interrelated concepts, tools, and disciplines that work best when used together.
INTENTIONAL	Stable, purposeful, and experienced. After gaining customers and team members, leadership agrees on a common set of tools and disciplines drawn from their personal or collective experiences.
ACCIDENTAL	Improvised, reactive, and disorganized. Most organizations start here, with leaders and team members following their own practices.

Categorizing how organizations operate is a relatively new endeavor. Until the late 1990s, organizations mostly ran on their own systems (Accidental or Intentional BOSs). Designed BOSs emerged in the early 2000s, and Integrated BOSs came along during the mid-2010s. Today, more than one hundred thousand companies are running on Designed or Holistic BOSs, and tens of thousands are running on an integrated platform like Ninety.

While the Designed BOSs provided tremendous value from the earliest of days, Integrated BOSs are now helping tens of thousands of organizations successfully transition their work from a physical workplace to a digital workplace. A SaaS platform's "whenever, wherever" nature is becoming increasingly critical as more and more employees spend some of their workdays away from a traditional office.

In short, whether you've considered it or not, your organization has a BOS. If you're like more and more businesses, your workers may not be in the office every single day, and we're confident you'll find out why nearly ten thousand organizations have turned our platform into the foundation of their digital workplace.

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Three Simple Steps

Three simple steps get you up and running on Ninety:

1. **Assess.** Is Ninety the right fit for your organization?

2. **Commit.** Agree and commit to using Ninety to upgrade your business operating system.

3. **Go.** Integrate Ninety and grow your business.

We're here to support you every step of the way. We mean it. Drop a note in our chat widget at the bottom right of Ninety, and you'll see just how fast we're there for you and your colleagues.

That's it! Before we get started, we have a few recommendations:

- If you're not already a subscriber, sign up for a free trial so you can follow along in Ninety.

- Hit us up for a demo.

- Sign up for one of our new user webinars.

How ready is your team for this step toward growth? Find out by taking our Baseline Assessment, which provides:

1. Scores outlining your strength in each of the 9 Core Competencies of a great organization.

2. Our sense of how open you and your team are right now to upgrading your BOS.

3. Our sense of whether you and your team are open to outside assistance from a BOS coach.

Take the Baseline Assessment

Hold on to your score. We believe it's powerful to make a long-term commitment to self-assessment and improvement. Now that you have a baseline, plot your improvement in the 9 Core Competencies each quarter by taking our Org Fitness Review during your Quarterly and Annual Planning Meetings.

If you stay committed to the upgrade, we're confident you'll see your scores improve significantly over time. The objective measurements will enhance your confidence in your decision to upgrade. There's a strong connection between your organization's strength in each of the 9 Core Competencies and its overall performance. Find out why less than 1% of our clients leave us each year once their entire company is taking full advantage of Ninety.

9 Core Competencies

VISION   CUSTOMER   GOALS   PEOPLE   STRUCTURE   DATA   MEETINGS   PROCESS   EXIT
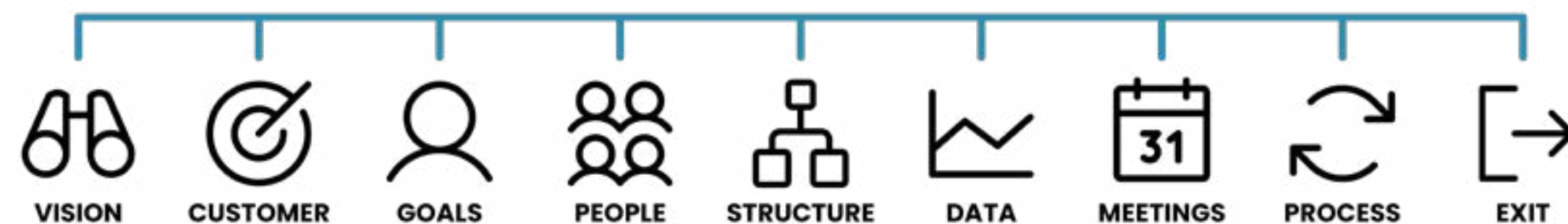
IS NINETY RIGHT FOR YOU?

Now that you've decided to explore upgrading your BOS, it's time to determine whether Ninety is right for you. Our On BOS Guide explains in-depth how a BOS works and includes descriptions of the prominent BOSs and BOS platforms out there, including Ninety.

With both a BOS (90os) and a software platform (Ninety) that supports individual companies and other BOSs, too, we're incredibly proud of the value we bring to our customers.

At the core of our success is our focus on our Compelling Value Propositions: customer service and innovation. Our budget prioritizes our Client Success team by empowering them to acquire whatever resources are necessary to serve our customers with world-class support. For example, for a more personalized experience, you can reserve a product demo and or join an interactive webinar run by a Ninety team member.

As we hope you'll discover, our innovative platform simplifies the process of building great organizations and helps teams work more effectively together. As you assess whether or not we're right for your company, explore our tools and see what some of our current clients are saying about us on our website as well as on third-party review sites. One of our guiding principles is to build high-trust relationships with every one of our Ideal Stakeholders. You'll find us more than willing to answer any question you have.

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"It's really exciting to realize I can achieve anything that I want to with the help of Ninety. It's a pathway for great achievement. I can strategize the priorities we need, tackle those Rocks that matter to me, and really move the needle for my business."

— Chris Breen, Legacy Decks

NINETY'S TOOLS

My 90. The My 90 page is "home base" for our users. It shows all the items the user is responsible for and generates charts to show progress on To-Dos, Rocks, Milestones, and Key Performance Indicators (KPIs).

Data. Make data your superpower with Scorecards in the Data tool. Track trends and customize which KPIs are monitored week to week, month to month, quarter to quarter, and/or year to year.

Rocks. A Rock is a 90-day or quarterly goal. Monitor the progress of your 90-Day Goals with the Rocks tool, and assign Milestones to share tasks with others across the company.

To-Dos. A To-Do is an agreed-upon task assigned to an individual, a team, or any number of users. You can also create personal To-Dos that are displayed on your To-Dos page but don't show up during Weekly Team Meetings.

Issues. At the heart of Weekly, Quarterly, and Annual Meetings are Issues. During our meetings, we Raise, Discuss, and Resolve (RDR) prioritized Issues.

Meetings. Maintaining a meeting cadence that works for your organization is critical to keeping everyone on the same page. Use our Meetings tool to establish or customize agendas, review previous meetings, and view Headlines.

Org Chart. Take advantage of our Org Chart tool to outline what each Seat is responsible for and show how the company is organized into departments and teams.

Vision. Our Vision tool encapsulates your company's Core Values, Compelling Why, Compelling and Audacious Goals, go-to-market strategy, SWOT analysis, and goals. Every team can create its own outlined Vision while simultaneously displaying the company's Vision. This transparency benefits the whole company.

1-on-1. Use the 1-on-1 feedback tool to schedule, prepare, and run meetings between managers and team members. The tool provides forms for each party to fill out before impromptu, Quarterly, or Annual Discussions.

Process. Individuals, teams, departments, and companies can create detailed procedure guidelines with our Process tool. Documenting proven processes helps increase efficiency and keeps team members on the same page about how the company creates and delivers value.

Directory. With the Directory tool, you can add every member of your organization, as well as key stakeholders, to the Ninety platform. Everyone can personalize their profile, so even in this virtual space, your company feels more human.

Mastery. Ninety provides you and your colleagues with a world-class BOS platform and all the context you need to understand the what, why, and how associated with every concept, tool, and discipline in the system. The Mastery tool is the in-app connection to the 90u Library. As you engage, learn, and master the core concepts covered in the library, mark them as "Mastered" during Quarterly Planning Meetings.

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Step 2: Commit

Now it's time to see if you and your colleagues are ready to commit to a journey of growth.

ALIGN WITH YOUR SENIOR LEADERSHIP TEAM

We understand that using new software can seem daunting. We want to share a bit about how we come to agreements at Ninety. We believe it's a mistake to expect your staff to begin using Ninety without their buy-in and agreement.

When leaders set expectations, they show they're unwilling to discuss potential hurdles to completing a task.

On the other hand, **agreements** are about working together. Agreements show our team members that:

1. We see them.

2. We want an authentic relationship with them.

3. We care about who they are, what they do, and what they think.

4. We're here to support them and help them grow.

5. We're willing to let them solve problems their way.

6. We want to know how things are going.

7. We're here to help them get smart stuff done.

When working within a team, we understand that there may be varying opinions regarding certain decisions. To operate well, though, teams must fully commit when making decisions. A commitment goes beyond conceding to a decision; it's a pledge to take action toward the success of that decision.

For example, let's say your Senior Leadership Team (SLT) elects to pause a new product launch in order to focus the company's collective resources on forging new partnerships. The goal is boosting sales and increasing cash on hand. However, the Head of Product turns their time and attention away from the work associated with your new partnership efforts to continue toward the new product. Next thing you know, neither goal is met.

Getting everyone on your SLT on board is essential if you're going to reap the full benefits of committing to using Ninety. The next section covers the four primary paths teams take to start using Ninety to focus, align, and thrive.

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Now that you're committed to upgrading your BOS, let's start working with Ninety.

1. Set up your personal and organization profiles (pictures, logos, colors, custom language settings, and more).

2. Invite your Senior Leadership Team.

3. Confirm your initial Team Member settings and their level of privileges, and adjust your global Ninety settings to your liking.

4. Have someone load the names of all your colleagues into Ninety's Directory. Having their names in the system doesn't cost you a penny, and you'll find it quite useful to have them already in there as you build out your Org Chart.

5. If you already have some vision, goal, or data-related information, you can enter it yourself now — or you can reach out to our team at Ninety, and we'll happily upload it all for free.

6. Decide on the best path for you and your colleagues to get up and running on Ninety. There are four paths that most non-coached leadership teams take:

The Vision-First Path　　**The Structure-First Path**　　**The Goals-First Path**　　**The GSSD Path**
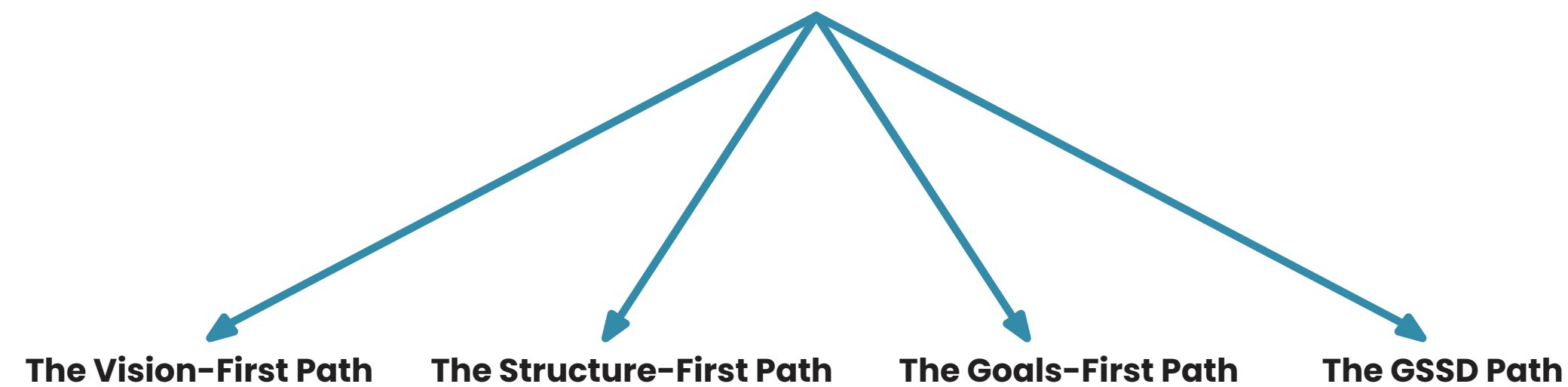
THE VISION-FIRST PATH

Your Vision includes a set of core commitments that we advise you and the rest of your Senior Leadership Team to make if you genuinely want to build a great company. We call these Focus Filters. The Focus Filters we believe every organization should commit to include:

- **Industry and Niche.** Your "Whats" (what industry you're in and what products or services you provide) are fundamental to understand.

- **Ideal Customer.** Your first "Who," these are your most sought-after customers. They're described by a specific set of ideal geographic, demographic, and psychographic characteristics.

- **Compelling Value Proposition.** Why do your Ideal Customers choose you over your competitors? The answer relates to your Compelling Value Proposition (CVP). A clear and compelling CVP helps you attract and retain your Ideal Customers.

- **Compelling Why.** Your organization's "Why," the reason you're in business. Why you care. And what your success would mean for the future.

- **Customer Journey.** What is the ideal process that every one of your prospects should experience as they go from first hearing about you to becoming a customer and then, hopefully, an enthusiastic fan?

- **Compelling and Audacious Goals.** Your long-term goals that are so bold they rally the whole organization as you do the great work required to get from here to there.

- **Core Values.** These define the behaviors of your second "Who," your Ideal Team Members. Who you hire. Who you keep. Your important, relevant, and enduring Core Values are the pillars of your culture.

We outline how to think about, create, document, and share your Vision in our Vision Builders Workbook. Nailing a clear and compelling set of Focus Filters is essential if you want to create a focused, aligned, and thriving company. We recommend the Visionary/CEO get away from the office on a private retreat to complete the workbook.

After returning, the Visionary should schedule an eight-hour Vision Setting Meeting with their SLT. Some teams complete the session in a single day, while others break up the session into two half days. Either way, we strongly recommend the SLT do this offsite so everyone is 100% focused on the job to be done.

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THE STRUCTURE-FIRST PATH

Several of the best-known BOSs kick off their coaching programs by heading down what we call the Structure-First Path. This path starts with your Senior Leadership Team leveraging some of our foundational concepts, tools, and disciplines:

1. Collectively review the **Baseline Assessment** results that came out of Step 1 of this Guide. These results include your organization's Stage of Development. Starting here ensures that you and your SLT are on the same page in terms of where your organization is developmentally and what it's likely to encounter on its journey to upgrading your BOS.

2. **The Org Chart**. A thoughtfully structured Org Chart is built with "structure first, people second" as the guiding principle. This is essential if you want to create a focused and aligned organization where everyone knows who's responsible for what, making it easier to determine if someone has the skills and experience necessary to thrive in a given Seat.

3. **The Issues and Rocks tools.** Every team has issues and goals. What most teams don't do well is decide which of these are critical and which can wait. This part of the session helps get your SLT 100% aligned in terms of your priorities. You'll create a long list of Issues and Rock candidates. Then, you'll agree on your priorities (aka Rocks) and see the power of compartmentalizing.

4. **Data Scorecards.** A great Scorecard contains the essential Key Performance Indicators (KPIs) that help us see when everything is going well and when it's not. Every team should have a Scorecard with 5–15 KPIs that capture what's important and have targets to reveal when there's an issue. Eventually, every person in your company should be responsible for 3–5 KPIs.

5. **Weekly Team Meetings and the meeting cadence.** Once your team is aligned on priorities and has begun the work of mastering the Data Competency, it's essential that you meet weekly to make sure everything is running reasonably well (see your Scorecard), at least 80% of your Rocks are on track to be completed on time, and you're solving Issues together. Add Issues that aren't urgent to your Short-Term Issues list throughout the week, then solve them as a team during your Weekly Team Meeting.

If you choose the Structure-First Path, we recommend that you and your SLT schedule either two half days or a full eight-hour day to hold a Foundation Setting Meeting. During the session, teams walk through a set of teachings and exercises around each of these foundational concepts, tools, and disciplines to help your organization create a solid structure to build upon.

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THE GOALS-FIRST PATH

The third path for beginning your journey with Ninety involves establishing your organization's 3-Year Goals, 1-Year Goals, and 90-Day Goals (aka Rocks) from the outset. These goals are created and documented during a Goals Setting Meeting.

Every focused, aligned, and thriving organization eventually turns into a goal scoring machine. Well-developed goals help define who we are, where we're going, and the pace we intend to take to get from here to there. They also inspire and align us up, down, and across our organization.

At Ninety, our teams commit to a collection of Rocks, and our departments commit to 2-Year, 1-Year, and 90-Day Goals. These clear commitments help us consistently achieve at least 80% of our goals across the entire company.

Your company should establish 3-Year Goals that are inspiring and simple to communicate and understand. They show your teams what's important, where the business is going, and how your organization's dreams can help them fulfill their own dreams. We recommend being as transparent with your financial goals as you are with your operational goals.

Our experience shows that with **3-Year Goals**, "less is more." We advise having 1–3 financial goals, 1–3 operational goals tied to KPIs, and 5–15 qualitative goals (such as "earn a Great Place To Work® designation," "launch a new product line," or "upgrade your HRIS").

1-Year Goals should be challenging and achievable. Research suggests that missing up to 15% of your goals is optimal for growth.

That margin ensures that your goals are both inspirational and relatively achievable. Research further reveals that celebrating hitting 80% of your goals will instill confidence that you and your SLT are effective at scaling your organization and creating an organization that consistently provides your employees with opportunities for career progression.

90-Day Goals, or Rocks, keep day-to-day responsibilities aligned with the organization's longer-term goals. The quarterly time frame of Rocks is an easily digestible scope, especially when broken down into Milestones. At Ninety, we observe the practice of holding one person responsible for owning a Rock. They aren't in it alone, but it's their responsibility to delegate pieces of the Rock to others and oversee its progress.

If you choose the Goals-First Path, we recommend you and your SLT schedule either two half days or a full day to hold your Goals Setting Meeting. During this eight-hour session, teams walk through a set of teachings and exercises associated with the immediate work that needs to be accomplished to win the next quarter — and the one after that.

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THE GSSD PATH

Ninety's founders and current leaders are entrepreneurs, coaches, investors, and board members. At our core, we love building and working with people who love building great companies.

While every great company is unique, one of the common characteristics associated with their leadership teams is a deep need to see progress every day. We get that. That's why one of our Core Values is "get smart stuff done," or GSSD. We love to surround ourselves with people who make things happen and think about the second- and third-order effects of their decisions.

The GSSD Path is for those leaders who want to get to work leveraging Ninety to GSSD immediately. They get the need to eventually create their Vision, set goals, and work on structure, but right now, they need to align on To-Dos, attack Issues, agree on critical KPIs and targets, and get to work on taking their Weekly Team Meetings to the next level.

Here's what you need to do to get started:

1. Get your entire **Senior Leadership Team** on Ninety.

2. Start putting your **Issues** and **To-Dos** into Ninety.

3. Schedule your **Weekly Team Meeting** on the same day, at the same time, and for the same agreed-upon duration (60–90 minutes).

4. Have each department leader add the 3–5 **KPIs** that define what good performance looks like in their department.

5. Have every member of your team read our **Weekly Team Meetings Guide**.

Now, begin implementing the Weekly Team Meeting (WTM) with Ninety's Meetings tool. You'll soon see its power. It'll help you prioritize and solve Issues. It'll help you align on allocating your scarce resources. It'll help ensure that you complete the work that needs to be done this week.

In short order, it'll help you avoid one-off meetings on topics that should have waited for everyone on your team to participate in — whether they're needed to help solve the Issue or just so they have the context on why the decision was made. One of our favorite teachings is: "If it's not urgent and important, can it wait for the WTM?"

The GSSD Path helps you immediately take your BOS to the next level. When you're ready to continue upgrading your BOS, create an Issue called "What part of our BOS should we upgrade next?" and decide if your next step is to schedule your Foundation, Vision, or Goals Setting Meeting. What matters is getting to work on upgrading your BOS.

We're Here to Help

We want to help you focus, align, and thrive as you build your company. We've added value to thousands of companies around the world and are constantly improving our concepts, tools, and disciplines to continue pursuing our passion for helping people build, run, and scale great companies.

As you start this journey, keep this in mind:

- Every organization is on its own journey. You've just begun yours.

- Most organizations roll out Ninety to their Senior Leadership Team and hold their initial planning sessions within the first three months.

- Eventually, the goal is to have the entire organization in Ninety with all your people trained on your business operating system.

- Ninety enables everyone to share issues and ideas and keep focused on the most important priorities.

- The process of rolling out Ninety to every level and every team member builds transparency and greater trust within your organization.

- Some companies take a year or two to fully roll out Ninety to every level.

- Enjoy the process. Make it your business operating system as you go and grow.

- We're here to help you every step of the way.

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CONTACT US

We love when we get the chance to chat with you directly. We have real people who are incredibly well-versed in Ninety ready to help you on your journey. Message us through the chat widget anytime!

You can also email us at helpful@ninety.io.

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RESOURCES

- **Ninety Help Center** | https://help.ninety.io/en/

- **Overview Videos** | https://www.ninety.io/resources

- **Subscribe to Recent Updates in Ninety** | https://www.ninety.io/product-updates

- **Subscribe to Our Blog** | https://www.ninety.io/blog

- **Join Upcoming Webinars** | https://www.ninety.io/resources#webinars

  » The First 90 Days With Ninety

  » Introduction to Ninety: Fundamentals and Best Practices Webinar

  » Ninety Office Hours

- **Ninety Courses and Events** | https://www.ninety.io/resources#events

  » Implementing Ninety Course — 6 live sessions to help you have a successful onboarding experience

  » Cascading Ninety Course — 4 live sessions to help you use Ninety throughout your organization

Takeaways

- Getting up and running on Ninety is as simple as 1, 2, 3 — you start with your Assessment, you make a Commitment as a team, and then you choose a path to Go and get started with upgrading your BOS.

- Don't underestimate the power of a commitment. It's important that you have buy-in from your Senior Leadership Team and that they're ready for the positive change you seek in your organization.

- We've said it a few times, but we'll say it again: We're here for you. This isn't a marketing tactic on our part; it's a core part of who we are and how we support you. Use our chat anytime. Join our events. Talk to us — we love to hear from you.

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Key Terms

- **9 Core Competencies** — The nine areas businesses need to master to build a great company. The 9 Core Competencies are Vision, Customer, Goals, People, Structure, Data, Meetings, Process, and Exit.

- **Baseline Assessment** — An assessment offering an initial benchmark of an organization's fitness based on its proficiency with each of the 9 Core Competencies.

- **BOS Platform** — A set of online tools used that help integrate data, opportunities, issues, processes, and people to help a business achieve its goals while accelerating its vision. Ninety is a BOS Platform.

- **Business Operating System (BOS)** — Every business has a system of tools, data, and processes that people in it use to get things done.

- **Focus Filters** — The essential elements of a simple but complete company Vision: Core Values, Compelling Why, go-to-market strategy (Ideal Customer, Industry and Niche, Compelling Value Proposition), and goals (CAGs, 3-Year and 1-Year Goals, Rocks). Each decision a team member makes should be aligned with these organizational commitments.

- **Foundation Setting Meeting** — A full-day or series of two half-day meetings used to introduce and implement some foundational BOS tools (Org Chart, company Rocks, Weekly Team Meetings, and Scorecard).

- **Goals Setting Meeting** — A full-day or series of two half-day meetings used to agree on, commit to, and establish the goals of the company that are aligned with its Vision (Compelling and Audacious Goals, 3-Year and 1-Year Goals, and Rocks).

- **Vision Setting Meeting** — A full-day or series of two half-day meetings used to agree on, commit to, and establish the non-goal elements of the company's Vision (Core Values, Compelling Why, and go-to-market strategy).

WHAT'S NEXT?

Thank you for taking the time to explore this guide. Now that you have a sense of how these concepts and their related tools advance a company's Vision, you may be eager to implement them in your own organization. We're here to help! Find more company-building information in the 90u Library or try Ninety today.