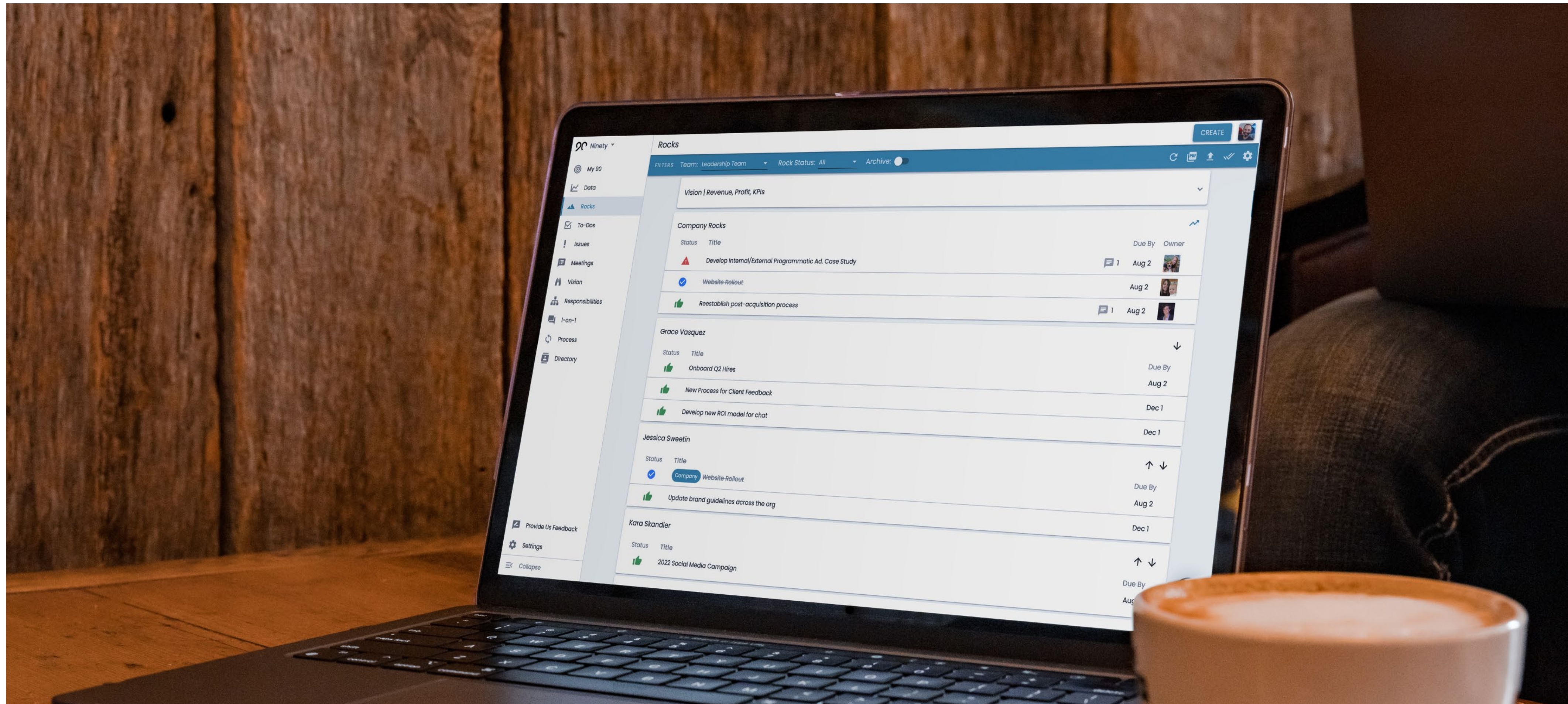




On Rolling Out Ninety

HOW TO IMPLEMENT NINETY AT ALL LEVELS OF YOUR ORGANIZATION

By Zack Swire and Tommy Mains | September 2024 | © 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 you with a cloud-based platform containing every one of the essential concepts, tools, and disciplines you need to upgrade your operating system.

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](#)).

Each of our guides 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
Founder + CEO, Ninety

Purpose

This Rollout Guide offers a road map for cascading Ninety to every level of your organization.

Why is it crucial to have everyone running on Ninety? Because if you limit Ninety's use to your Senior Leadership Team (SLT), you'll only experience a small portion of its full benefits. When you integrate Ninety into every level of the organization, you have taken a huge step toward having everything you need to create a high-trust, agreements-based culture — an organization where everyone is working as one.

Ninety is built for everyone in your company. In this guide, we'll provide practical steps for effectively implementing Ninety and rolling it down and across to every team member in your organization. By aligning your teams on one central platform, you'll propel your organization toward sustainable growth and success.

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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Introduction

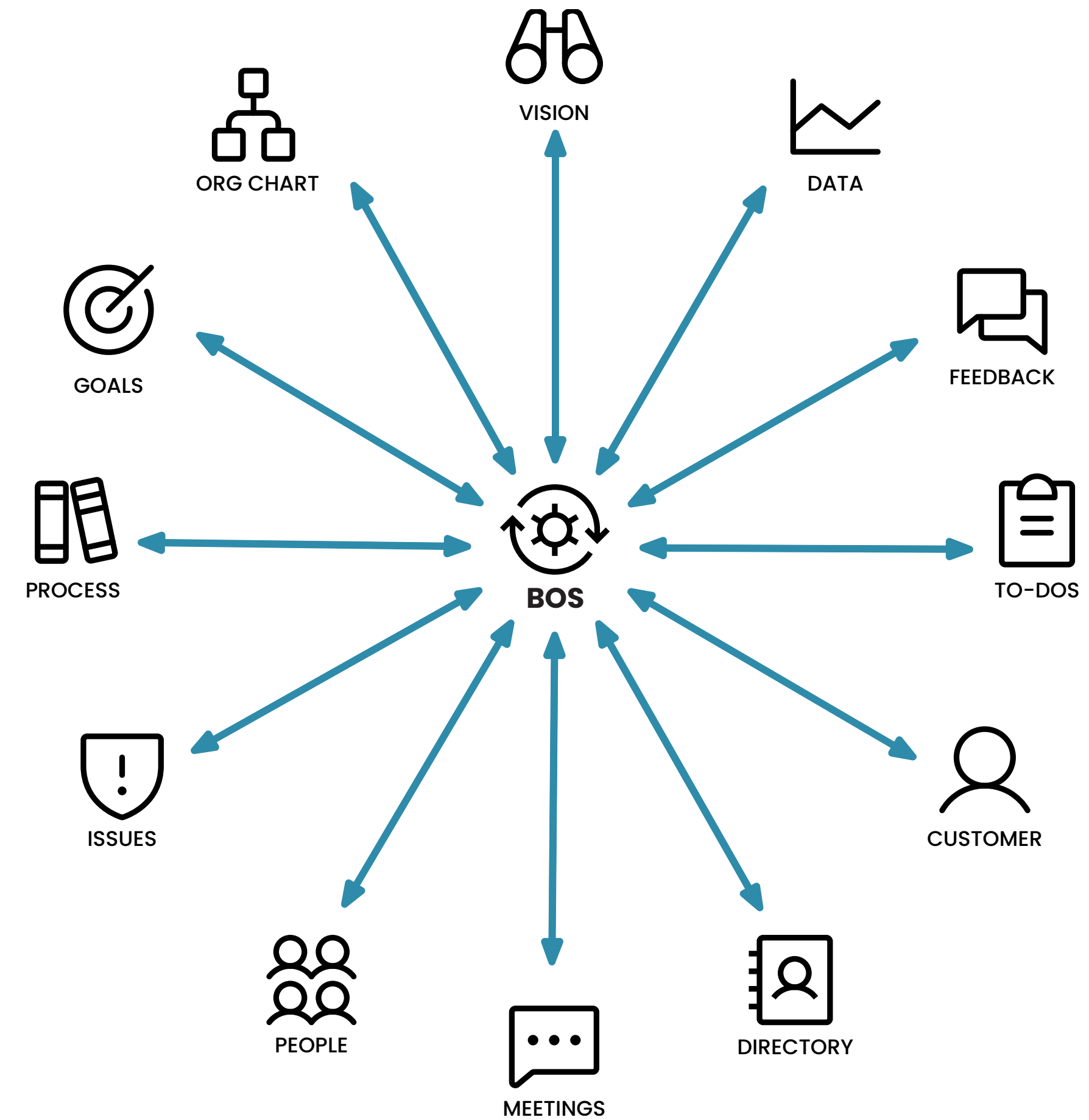
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WHAT IS A BUSINESS OPERATING SYSTEM?

Every organization has a business operating system (BOS) — an established way of operating. The question is, how effective is it? A BOS is a purposeful collection of the core concepts, tools, and disciplines your entire organization uses to turn your vision into reality. It includes tools for communicating structure, setting goals, and running meetings. At its core, it ensures that everyone is focused, aligned, and working toward building a thriving organization that has [high-trust relationships](#) with all its stakeholders.

Every business has some kind of BOS from day one. Sometimes this BOS is accidental, while sometimes it's designed by external experts to address all significant elements associated with building a great company. We'll explore different BOS profiles on the next page.

Additionally, more and more organizations are turning to platforms like Ninety to make communication simpler and increase transparency. Ninety provides every one of the essential concepts, tools, and disciplines leaders need to align and focus their teams. BOS platforms like Ninety have become almost essential as more companies move to a “work from anywhere” model.



In our work, we've identified five primary **BOS profiles** (**Figure 1**). As the business operating system advances, so does the business.

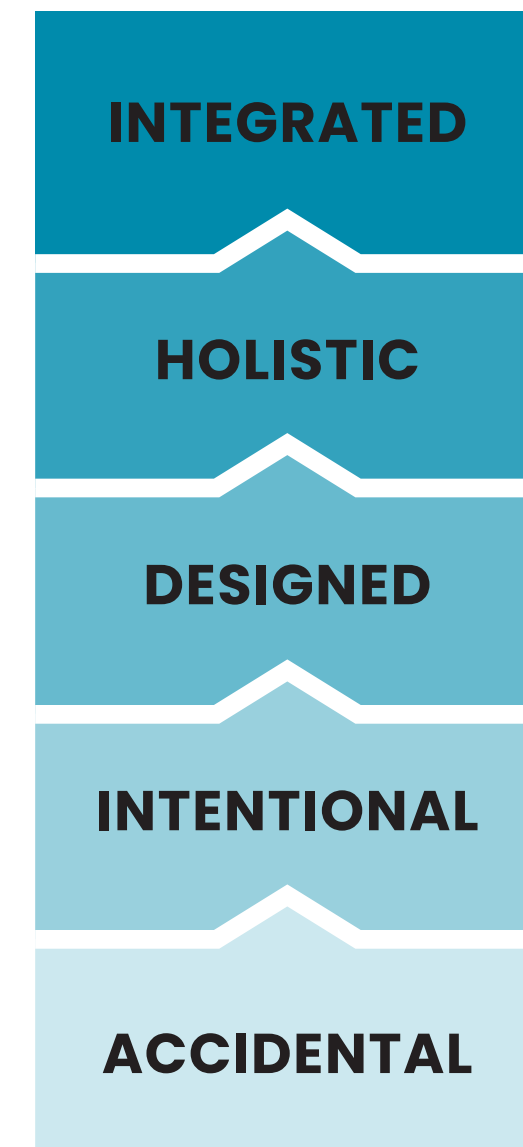


Figure 1. There are five types, or profiles, of BOS: Accidental, Intentional, Designed, Holistic, and Integrated.

Accidental BOS

Most businesses start with an Accidental BOS. Leaders who launch a business typically follow their own practices at the outset, and as people come on board, they follow their own practices as well. Soon, there are a lot of people using too many different tools to do the exact same kind of work. An **Accidental BOS** is mostly improvised, reactive, and disorganized — the aim is survival.

Intentional BOS

As a business stabilizes and gains customers and team members, it begins to use learned experiences to create a purposeful, if preliminary, operating system. The Senior Leadership Team (SLT) might assemble an **Intentional BOS** using agreed-on tools and disciplines drawn from their personal or collective experiences.

Designed BOS

As the organization continues to scale, the SLT might adopt a Designed BOS configured by an expert in the field based on their experience with hundreds of businesses. A **Designed BOS** consists of interrelated concepts, tools, and disciplines that work best when used together.

Holistic BOS

This system aims to address all the major concepts, tools, and disciplines associated with building an enduring company. For a growing company, when a need arises, there's a time-tested solution and a proven methodology for mastery ready to go. A **Holistic BOS** supports all the main business functions, enabling continuous learning and rising success.

Integrated BOS

Leaders who aspire to realize their vision and actualize their business's potential employ an **Integrated BOS**, a BOS run on a cloud-based platform that combines proven concepts, tools, and disciplines with seamless data integration. The platform provides a complete cross-organizational view of KPIs, goals, responsibilities, and more. With this BOS in place, the founder or entrepreneur has likely stepped away from daily operations, confidently leaving the SLT to steward organizational success.

HOPEFULLY HELPFUL HINT

An Integrated BOS runs on a cloud-based platform that combines proven concepts, tools, and disciplines with seamless data integration. By upgrading your BOS to run on Ninety, you're one step closer to having an Integrated business operating system.

Upgrading Your BOS

At Ninety, we've been studying business operating systems for decades to distill their wisdom, create best-in-class tools, and discover the best practices for building, running, and scaling a great company. If you're like many businesses, your workers may not be in the office every single day. We're confident you'll find out why over twelve thousand organizations have turned the Ninety platform into the foundation of their digital workplaces.

Ninety supports a variety of popular BOSs, such as the Entrepreneurial Operating System® (EOS®) and Pinnacle Business Guides, as well as offering our native 90os. Organizations can also use the custom language feature to customize Ninety to fit their unique BOS.

With a Coach

If you have a business coach or a BOS implementer, they'll typically help you begin working on Ninety during your first few coaching sessions and will be available to answer your questions throughout the process.

Self-Implementing

If someone on your Senior Leadership Team is taking the role of the coach, we've created a wealth of resources to help you get started on the journey of upgrading your BOS:

- [Business Operating System Brief](#) and [On Business Operating Systems Guide](#) — Learn about the five types of business operating systems and how upgrading your BOS simplifies the hard work of successfully building and scaling your organization. Our in-depth guide also previews some of the most popular BOSs used today so you can start considering which best fits your organization.
- [Stages of Development Brief](#) and [On Stages of Development Guide](#) — Every business goes through five predictable Stages of Development as it grows. Learn about each stage, take our assessment to determine where your organization is, and start planning for the next stage.
- [9 Core Competencies Brief](#) and [On 9 Core Competencies Guide](#) — Gain an understanding of the 9 Core Competencies organizations need to master to become great companies.
- [Baseline Assessment](#) — Analyze your strengths and weaknesses in the 9 Core Competencies. By completing this assessment at the start of your journey, you'll establish a baseline that you can measure against each quarter to see objective proof of your development as an organization.
- [The 90u Library](#) — Bookmark our extensive library of resources designed to help your team in all stages of your journey with Ninety — and beyond.



Introduction

continued

BENEFITS OF ROLLING OUT NINETY

Rolling out Ninety across the organization has numerous benefits, including:

- Improved goal alignment and execution
- Streamlined processes and better decision-making
- Enhanced communication and collaboration
- Increased transparency and accountability
- Trusted frameworks to create an agreements-based culture
- Shared understanding of your organization's health

Improved Goal Alignment and Execution

When everyone in the organization is on the platform, it's easier to align goals and ensure everyone is focused on and working toward the same objectives, increasing your likelihood of success. This is one of the reasons for our name, Ninety: Imagine every team and individual conducting 90-day marches where they consistently deliver on 90% of their goals. Doesn't it sound great?

When you hold your [Quarterly](#) and [Annual Planning Meetings](#) at your SLT level first, you establish your organization-wide goals, allowing time for your departments to set aligned strategies with their quarterly [Rocks](#) and 1-Year Goals. Additionally, supporting Rocks and important [issues](#) can be cascaded to departments for consideration during their departmental planning meetings.

Streamlined Processes and Better Decision-Making

Ninety helps streamline processes and improve decision-making by centralizing information, facilitating data-driven decisions, and reducing the time spent on unnecessary meetings. When everyone uses the platform and adheres to a BOS's best practices and disciplines, you'll achieve higher efficiencies across the organization.

Two things that BOSs incorporate into organizations are meeting structures and issue-solving frameworks.

Instituting [Weekly Teams Meetings](#) (WTMs) keeps your teams in sync with their departments, cross-departmentally, and while completing quarterly projects.

[Issue solving](#) is one of the most critical elements of an effective meeting. It's guided by better information and bringing together the people who can best help solve the issue.

TOOL TIP

When Ninety is rolled out to each level of your organization, teams can simply click on any issue, click on the three dots to open more options, and send it to another team for their review.

Enhanced Communication and Collaboration

By involving everyone in your company, you ensure seamless communication and collaboration across all teams. This enables your teams to make better decisions and work more effectively.

Ninety's [Meetings tool](#) simplifies planning, data monitoring, and goal achievement. Customize your agendas for any meeting cadence or team need to make the most out of our platform.

Since Ninety connects all your BOS's tools, the [1-on-1 feedback tool](#) pulls critical data from your [Org Chart](#), [Vision](#) planner, [Scorecard](#), and more so that every one of your team members gets the support they need.

Increased Transparency and Accountability

When everyone is using the Ninety platform, it's easier to track progress, identify bottlenecks, cascade items, and hold each other accountable to our agreements.

The My 90 workspace displays a user's To-Dos, Rocks, and KPIs. Establish a daily practice of checking My 90. This will familiarize team members with the platform and keep their agreements top of mind.

Ninety's Meetings tool is the heartbeat of your organization, providing proven agendas to help everyone report on progress and work together.

Frameworks to Create an Agreements-Based Culture

Agreements sit at the center of the Agreements-based Leadership and Coaching (ALC) framework and shape the commitments team members make to leaders and each other.

From agreements-based To-Dos to the components of our 1-on-1 tool — which features ALC principles and a mutual assessment of a team member’s Commitment, Competency, and Capacity to capably do their job — Ninety has tools to help foster and sustain high-trust relationships.

Shared Understanding of Your Organization’s Health

These five benefits combine to form a standardized method for establishing high-trust relationships, sustaining an agreements-based culture, and measuring your organization’s health. Goals from individuals, teams, departments, or the whole company can quickly be seen as on or off track. Each quarter, teams evaluate their Rock completion percentage and grade themselves on their performance. Great companies regularly complete 90% of their Rocks each quarter.


Solving issues, completing To-Dos, and sticking to an operational meeting cadence is another benchmark of your company’s well-being. Using Ninety to systematize your BOS makes it easier for team members to understand the guide posts, or [Focus Filters](#), of how your organization succeeds.


For example, you’ll know your team is healthy when they’re finding meaningful resolutions for issues, identifying goals that will advance the organization’s vision, and staying on target with KPIs.


This added layer of awareness and transparency helps your team know what’s working and what needs to be improved. Put simply, using Ninety as the common touchstone for your organization improves your ability to get smart stuff done, what we call GSSD.




NINETY'S TOOLS


 **My 90.** The [My 90 workspace](#) is “home base” for our users. It shows all the content the user is responsible for and generates charts to show progress on To-Dos, Rocks, milestones, and 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 in your To-Dos tool and My 90 workspace but don't populate in 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 pulse that works for your organization is critical for 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](#) 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.

 **1-on-1.** Use the [1-on-1 feedback tool](#) to schedule, prepare, and run meetings between leaders 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 the 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 best-in-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-platform 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](#).

The Ninety Platform

The right tools for the right job boost your productivity and free up brainpower to focus elsewhere. Ninety's tools integrate the concepts, tools, and disciplines of your BOS to bring them to life in an intuitive platform for everyone in the organization.

The 90u Library

Knowing the tools are useful and learning how to make them work for your unique needs are different matters. We're happy to explain the benefits of our tools, teach you how to leverage them, and show you how they work together in the Ninety platform to help transform your entire organization. Our extensive [90u Library](#) has in-depth content about the best practices to accelerate your organization's growth. Use our Mastery tool to track your progress through the 90u Library.

VISIT THE 90U LIBRARY

Live Training Webinars

Are you more of a visual or interactive learner? Join one of our [weekly live training webinars](#), where experts on Ninety walk through the tool live and answer questions in real-time.

SIGN UP NOW

Rolling Out Ninety



Total: 07:44

03:09

SUSPEND

1. SEGUE (01:04) 1 MIN

2. DATA (03:31) 5 MIN

3. ROCK REVIEW 5 MIN

4. HEADLINES 5 MIN

5. TO-DO LIST 5 MIN

6. CDS 60 MIN

7. CONCLUDE 5 MIN

FINISH

VIEW TOOL

SHOW NOTES

ROCK REVIEW | Weekly Meeting - Leadership Team

Team: Leadership Team Rock Status: All Archive: ☐

Vision | Revenue, Profit, KPIs

Company Rocks

| Status | Title | Due By | Owner |
|--------|---|--------|-------|
| | Develop Internal/External Programmatic Ad. Case Study | Aug 2 | |
| | Website Rollout | Aug 2 | |
| | Reestablish post-acquisition process | Aug 2 | |

Grace Vasquez

| Status | Title | Due By |
|--------|---------------------------------|--------|
| | Onboard Q2 Hires | Aug 2 |
| | New Process for Client Feedback | Dec 1 |
| | Develop new ROI model for chat | Dec 1 |

Jessica Sweetin

| Status | Title | Due By |
|--------|--|--------|
| | Company Website Rollout | Aug 2 |
| | Update brand guidelines across the org | Dec 1 |

Kara Skandier

| Status | Title | Due By |
|--------|----------------------------|--------|
| | 2022 Social Media Campaign | Aug 2 |

Edit Rock

Due Date * 8/2/2022

Company Rock: ☐

Team * Leadership Team

Add to other teams Project SF

Title Reestablish post-acquisition process

B i A: ¶: +:

Specific: What specifically will you achieve?
Measurable: How will i measure completion?
Achievable: Is it achievable by me or my team?
Relevant: How is it relevant to our vision or goals?
Timely: What are key dates and what is the final date?

14

Build out the rock so there is a clear definition of what "complete" looks like

Description of the Rock! -Lead, Manage, Accountability (LMA)
-Payroll(AR/AP)Banking (Reporting)(HR/Admin)Tax / Licence / InsmcGrp
Benefits Bkkr / Acctnt Billing Contracts Existing / Expiring HR Recrute

Milestones +

☒ Phase 1

☐ Phase 2 Completed

OVERVIEW

Each organization may roll out its BOS a little differently. The following major steps outline our time-tested path for an effective rollout.

1. Start with your Senior Leadership Team.

- » Get up to speed on what a BOS is, how to upgrade yours, and how Ninety simplifies this process.
- » Agree on your vision, goals, organizational structure, and meeting cadence. Then, document it all in Ninety.
- » Get your SLT comfortable with operating in Ninety.

2. Then, roll out to the entire company.

- » Hold a whole-company meeting to let everyone know you're upgrading your BOS — and why.
- » If you're comfortable, roll Ninety down to your department-level meetings.
- » Over time, let each department leader decide on when it's time to roll Ninety down to each of the teams.

3. Set a cycle of learning and improvement.


- » Remember that rollout is not a perfect science, and it's not the same for everyone.
- » Use change management to facilitate the process.

Our rollout plan takes best practices from thousands of companies using Ninety, our [Help Center](#), and coaches and implementers who've assisted organizations in successfully rolling out Ninety. Let's dive into each step in more detail.



STEP 1: SENIOR LEADERSHIP TEAM

Begin by implementing Ninety with your Senior Leadership Team (SLT). By working on the platform with the SLT first, you can gather feedback and align on its utility before committing to rolling out Ninety company-wide. We offer a host of resources to help you launch your BOS upgrade:

- » [Take Our Baseline Assessment](#) — In this assessment, you'll learn your Org Fitness Score, which averages your overall mastery of the 9 Core Competencies.
- » [Getting Up and Running on Ninety Guide](#) — Whether you're self-implementing or working with a coach, this guide answers all your questions about Ninety and outlines a step-by-step approach to make onboarding as smooth and painless as possible.
- » [Getting Started with Ninety Workshop](#) — Join our free, interactive six-session workshop to kickstart your implementation of Ninety with the live guidance of an expert Ninety Software Trainer.
- » [The First 90 with Ninety](#) — This step-by-step checklist guides you through your first 90 days with Ninety, breaking up the onboarding process week by week so you can integrate Ninety in manageable chunks.
- »  **Live Chat** — If you're stuck, we're always happy to help! Reach out to our Client Support Specialists through the chat bubble on our website for one-on-one help to ensure you're fully comfortable with the platform. We pride ourselves on providing the best support in the industry.

When your SLT consistently uses the same methods for establishing agreements, conducting meetings, solving issues, tracking data, providing feedback, vision planning, and more, you'll be ready to cascade Ninety down to more teams.



WHAT'S A BOS AGAIN?

A business operating system (BOS) is an organized set of concepts, tools, and disciplines that describes how an organization operates.

NEED HELP BUILDING YOUR VISION?

Our step-by-step [Vision Builders Workbook](#) guides you through creating a compelling and shared vision that your organization will be excited to follow.

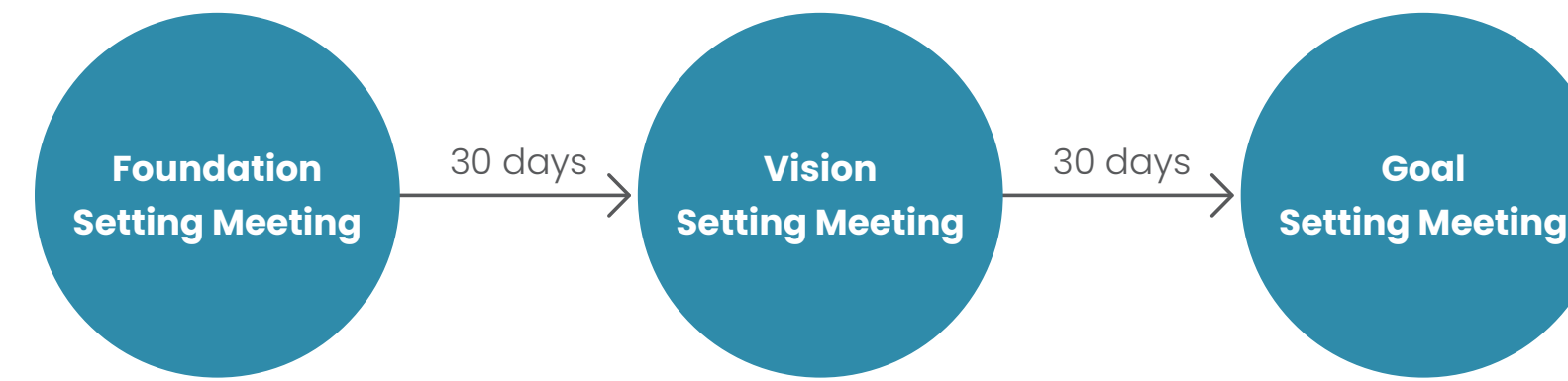
Initial BOS Strategy Sessions

Depending on your chosen BOS, the timing of your initial strategy sessions and what you cover in each may be a bit different.

If you have a coach, they'll guide you through the process. If you're self-implementing, we've created [a library of knowledge](#) covering the essential concepts, tools, and disciplines needed to build a great company. You can use these resources to guide your organization through the process.

Our BOS, 90os, uses a set of three adoption meetings: the [Foundation Setting Meeting](#), [Vision Setting Meeting](#), and [Goals Setting Meeting](#). These are referred to as Alignment Meetings, and there's a section in the 90u Library that contains all the supporting materials you need to run each meeting, including facilitator's guide session decks. During these meetings, you and your SLT agree on your Focus Filters, including your vision, goals, and go-to-market strategy. These are documented in Ninety's Vision tool for the entire organization to see.

Here's what's usually covered in the Alignment Meetings:



- **Assessment** — You'll take Ninety's [Baseline Assessment](#) to help you determine the strength of your current BOS. You'll use this initial result to track your progress as you upgrade your BOS.
- **Org Chart** — You'll build an Org Chart to ensure you have the [right people in the right seats](#) and full transparency of the organization's structure.
- **Scorecard** — You'll set or refine key performance indicators (KPIs) on your company [Scorecard](#), a representative blend of leading and lagging indicators that are consistently tracked in your [Weekly Team Meetings](#).
- **Vision** — You'll create your Vision plan, which includes your [Core Values](#), [Compelling Why](#), industry and niche, [go-to-market strategy](#), and road map of goals from 90 days out to your [Compelling and Audacious Goal](#).
- **Meetings Cadence** — You'll learn the best practices associated with a great Weekly Team Meeting as well as what your quarterly and annual meeting cadence will look like forever more.

As you build these essential pillars of your organization, you'll be documenting them in Ninety. When you're ready, share them with everyone in your organization.

SLT Rollout Checklist

After your SLT masters the following, we think you'll be ready to roll out your BOS and Ninety to the rest of the organization. Here are the essential checkpoints with an estimated time to completion.

☐ **Your SLT is fully set up in Ninety (1 hour)**

At this point, you've already decided on your BOS (90os, EOS, or other), and you've already decided to work with an EOS Implementer® or some other type of business coach. If you're unsure how to get your initial profile set up and your SLT onboarded in Ninety, reach out to our live chat support — we're happy to help!

☐ **You've set up your SLT's Weekly Team Meeting (30 min)**

You've established a Weekly Team Meeting (WTM) with your SLT that is held on the same day and time each week. This meeting is essential for ensuring everyone is aligned and marching toward the same goals day after day, week after week, and month after month. Everyone attends every WTM, only missing for extenuating circumstances (or vacation).

☐ **You've adopted all the core tools (1–2 months)**

You've completed a Baseline Assessment (or equivalent survey for your BOS) and established a vision, Scorecard, and Org Chart. During the Alignment Meetings, you've also established your initial [Rocks](#) (90-day goals) and how you'll process and solve [issues](#), and you're staying accountable by completing [To-Dos](#). By this time, you should have put your entire next year of [Quarterly Planning Meetings](#) and your [Annual Planning Meeting](#) on the company calendar.

☐ **You hold consistent Weekly Team Meetings (1–2 months)**

Your SLT continues to meet each week, and you're getting better at spending the first half in reporting mode while adding issues to your list, and spending the second half of your WTM solving the key priorities on your issues list.

☐ **You're solving issues during WTMs (1–2 months)**

Following the best practices from our [On Weekly Team Meetings Guide](#), you're getting better and better at raising, discussing, and resolving the issues standing in your team's way. This process is the key differentiator between worthwhile meetings and that "could've been an email" feeling.

☐ **You're seeing a positive shift in your SLT (1–2 months)**

Your SLT is growing in accountability, and you're seeing the benefits of your weekly meetings in action. Teams that are doing this well report a feeling of growing trust and openness among their members.

HOPEFULLY HELPFUL HINT

Having more issues is not a bad thing; it's a sign of progress. As you go from setting your strategy to holding consistent weekly meetings, you'll begin to see more issues arising. That's due to your efforts to stay consistent in reporting, tracking, reviewing, and discussing all that is going on in your organization. That's completely normal — it's actually what you want to see. Issues include various items for discussion, ideas, and problems that need a solution. You don't need to work through all your issues every week, just the most urgent and important ones.



Rolling Out Ninety

continued

STEP 2: COMPANY ROLLOUT

After seeing the improvements from running on Ninety with your SLT, it's time to bring it to the other teams in your organization. When upgrading your BOS and integrating Ninety into your daily operations, everyone needs to fully embrace the change.

Ninety isn't just another app — it's a complete system designed to foster transparency, accountability, and efficiency. As such, it works best when it's fully utilized, from planning your strategy and tracking your goals to managing your weekly meetings.

This is your chance to elevate agreements-based accountability, boost productivity, and reach unprecedented heights of organizational health and well-being. But it starts with a commitment — a commitment to upgrade, to adapt, and to strive for excellence at every level of your organization. If you truly want to get the most out of your BOS and Ninety, commit fully, train diligently, and use the platform to its maximum potential.

That said, company rollout doesn't happen all at once.

Just like when your SLT was learning to incorporate Ninety into their workflows, bringing Ninety and your BOS to the rest of the organization will happen in stages.

When you're ready to roll out your BOS to the next level down in your organization, add "Rollout" to your SLT's issues list. If you're working with a coach, you'll want to seek their input on timing. If you're self-implementing, we suggest you complete the [SLT Rollout Checklist](#) in the previous section before rolling out Ninety to the rest of your organization.

You'll want to designate a rollout champion (more on this in the next section). The champion will be accountable for a Rock to bring your BOS and Ninety to more teams.

This Company Rollout Section will focus on:

- Selecting a champion
- Running a State of the Company Meeting
- Creating rollout Rocks for SLT members

SELECTING A CHAMPION

To ensure a successful transition, you need a "who." You need someone who will be accountable for the rollout — someone who team members can go to when questions inevitably arise.

Selecting your change champion depends on how your organization is structured. Typically, the best candidate is your

organization's second-in-command, which EOS refers to as an Integrator™. Depending on the size of your organization, the visionary or a department head may need to take on this initiative. For now, we'll refer to them as your champion.

Your champion is accountable for:

- The Company Rollout Rock
- Holding each department leader responsible for rolling out Ninety to their department
- Establishing processes for onboarding existing teams and new hires

Unite with Department Leaders

The champion needs to come up with a plan for how each department will roll out Ninety, first into their departmental leadership teams and subsequent teams beyond that.

The champion should schedule one-on-one meetings with each department leader. During this meeting, they need to solve the issue of rolling out Ninety in their department's leadership team. They need to form an agreement on and commit to a timeline. The timeline should include which tools the team will incorporate (and when) and the team's weekly meeting agenda.

With an agreement in place, schedule another one-on-one meeting to assess progress and begin planning for the rollout to other teams in the department.

Establish Onboarding Processes

As the accountable person for your rollout, one of the first things your champion should do is ensure all existing team members are added to your Directory in Ninety. For any Seat you're not ready to pay for, add them as an Observer — a free role with access to view the Vision, Org Chart, and Process tools. It's important to note that Observers don't get the benefit of owning Rocks, KPIs, or taking advantage of Ninety's 1-on-1 feedback tool.

The rollout champion needs to outline processes showing teams how to adopt the essential elements of your BOS, including how you run meetings, what constitutes a



good Rock, how you resolve issues, and more. Your BOS of choice or your coach should have plenty of content to assist you with this. Additionally, we've created a [library of resources](#), offer free webinar and workshop opportunities, and have an excellent Client Success team to support you.

RUNNING A STATE OF THE COMPANY MEETING

It's essential to communicate clearly and transparently as you embark on the journey of upgrading your BOS. This shift in how you build and scale your company is significant and involves everyone in the organization.

When scheduling a company-wide meeting, aim to announce the reason for the upgrade, explain why it's happening now, and highlight the benefits Ninety and an upgraded BOS will bring.

State of the Company Meetings should cover:

- **What and Why:** Explain what brought you to this point. Maybe, like us, you see the value of building the type of high-trust, agreements-based culture that creates and sustains an extraordinarily productive, humane, and resilient organization where everyone is focused, aligned, and thriving. This means you have implemented concepts, tools, and disciplines the Senior Leadership Team uses that you will bring to the rest of the company over time. Explain how upgrading your BOS and incorporating Ninety will streamline processes, enhance collaboration, and create healthy accountability. This isn't a mere change of tools but a transformative step toward a more efficient, transparent, and agile organizational culture — a place where leaders lead and team members feel empowered to do great work.

- **Your Vision:** Present your vision, ideally showing exactly what you have memorialized in Ninety. Explain the power of focus and having a small set of Focus Filters that makes it clear what matters so that everyone's actions are consistently aligned with and guided by what we call Forever Agreements, such as the definitions of Core Values, Compelling Why, Ideal Customer, and Compelling Value Proposition.
- **Your Transition:** Present your updated Org Chart and explain how the upgrade will likely take place layer by layer and team by team. Explain how your champion will lead the rollout, and department leaders will let their teams know when changes will take place. Make it clear that this is a collective journey. Everyone's participation, understanding, and commitment are vital. Emphasize how each team member plays a crucial role in the successful integration of Ninety and your BOS.
- **Ongoing Practices:** Let everyone know this is the first of every quarter's State of the Company Meeting. Every quarter, you'll go over the company's vision, goals from last quarter, and what you're focusing on next quarter. Other company-wide processes, like how you onboard, review, promote, reward, hire, and fire, will be revamped to include these critical concepts, tools, and disciplines.
- **Questions:** Address any questions and concerns openly, emphasizing the long-term gains over any short-term discomfort the upgrade may bring.

A well-executed introduction meeting can help build buy-in from the whole organization, reduce resistance, and set the stage for a smooth transition to your upgraded BOS running on Ninety.

WHAT ARE MILESTONES?

Milestones are designated segments of a Rock that can be assigned to anyone in the organization.

Team Rollout

After each department's leadership team is up and running on Ninety, it's time to start rolling out elements of the BOS and Ninety to additional teams. Have each department leader document a Rollout Rock. The champion can help them think through what's best to incorporate per department and team.

After making your Departmental Rollout Rock [SMART](#), you can load it into Ninety, complete with milestones that turn into To-Dos a week before they're due.

SAMPLE ROLLOUT ROCK MILESTONES

- **Create the next team in Ninety** — Invite team members to Ninety, add them to their team(s), and set up their recurring Weekly Team Meeting on your company calendar.
- **Decide on each team's meeting agenda** — Teams may need adjusted agendas depending on any unique section or time frame needs. Set up the meeting so the team can address critical issues.
- **Select KPIs for the team** — Each team should choose 5–15 KPIs to track and understand how they are performing. Learn more about KPIs and the Data tool in our [On Data Guide](#).

HOPEFULLY HELPFUL HINT

By the end of a team's first quarter in Ninety, they should see a positive shift in accountability and productivity — especially due to their Weekly Team Meetings.

- **Identify additional Rocks** — Determine if there are more Rocks to add for the team or department as a whole.
- **Hold a team rollout kickoff meeting** — Address these key points at the kickoff meeting:
 - » **Review specifics** from the State of the Company Meeting. Cover anything specific to the team and address any lingering questions.
 - » **Share an overview** of how your business is using Ninety to upgrade your BOS.
 - » **Clearly communicate the benefits** of using Ninety, emphasizing the positive impact it will have on everyone's daily, weekly, monthly, and quarterly focused efforts. Make it about them, not just your organization.
 - » **Share how Ninety has helped** your SLT grow since you began this process.
 - » **What can they expect?** Be clear on when each team will start running weekly meetings, what other tools they'll implement, what your plan is for other teams in the department, and how they can help.

» **Have fun with this meeting!** Some teams celebrate Core Value stories about team members going above and beyond in the early stages of your BOS development and implementing Ninety. Be creative, and make it about the team members who are present.

- **Learn about Business Operating Systems** — Have your team read the [Business Operating Systems Brief](#) or [Guide](#) to better understand how Ninety powering your BOS will help your organization thrive.
- **Schedule the team's first Quarterly Planning Meeting (QPM)** — QPMs are designated times for establishing Rocks, solving long-term issues, and building [trust](#) and accountability among team members. We recommend ensuring the SLT is comfortable with their own QPMs before they have other departments start holding their own.
- **Weekly Team Meeting check-in** — How are their WTM's going? With weekly practice, this team should be getting better at spending the first half in reporting mode while adding issues to the list and the second half solving the key priorities on their issues list.

TOOL TIP

Facilitating a Weekly Team Meeting is a bit of an art, and it takes time to learn how to do it well. Assign a scribe to manage the software and write notes so the facilitator can stay focused on running a great WTM.

Full Company Rollout

Once your SLT and departmental leadership teams are fully versed in your new BOS and integrated into Ninety, continue the rollout for every team and team member in your organization.

Take it one level at a time. Continue to use your Org Chart to map your rollout levels, and assign rollout Rocks at each level to stay on track. Keep going until your BOS is fully rolled out to your entire organization.

We recommend that you confirm the readiness of each level by ensuring the team above is solid on your BOS. That way, they're ready to teach and facilitate your BOS to the next team. Reference our [Sample Rollout Rock Milestones](#) and [SLT Rollout Checklist](#) from earlier to establish their readiness.

Each team's timing is different. Often, teams will run Ninety for a quarter or two before rolling it down to the next level.



Onboarding After Your Rollout

Outside of the dedicated team rollouts, you'll need to establish a few processes to ensure new team members or anyone moving to a new Seat is able to get up to speed.

Your champion can work with the team that owns HR-related responsibilities to confirm that two critical processes are established: Onboarding New Hires and Onboarding New Team Leaders. This can be done by creating Rocks related to those processes to ensure a team member is accountable for gathering all necessary resources.

For onboarding new hires, you'll want to create materials these new team members can consume to understand the essential elements of your BOS, including how you run meetings, what constitutes a good Rock, how you solve issues, and more.

For onboarding new team leaders, provide the resources described above as well as information on how to facilitate their team's meetings and any other critical leadership responsibilities associated with the other tools you have adopted. For example, if your company uses the [1-on-1 tool](#), what are the agreements for how each leader conducts those reviews quarterly?

Your BOS of choice or your coach should have plenty of content to assist you with this. You're already aware of many of our [resources](#), but feel free to reach out with any questions.

STEP 3: LEARN AND IMPROVE

Rolling out your BOS to the entire organization is an important first step in a larger journey of continuous growth and improvement. Since you're building the type of organization that withstands the test of time, that plays [an infinite game](#), you know you're never really "done" getting better and better.

As you grow stronger in the [9 Core Competencies](#), you'll work your way toward a Stage 5 company that's become a steward for a larger vision. Read our guide to learn more about the [Stages of Development](#).

WHAT ARE THE 9 CORE COMPETENCIES?

These are nine areas businesses need to master to build a great company — Vision, Customer, Goals, People, Structure, Data, Meetings, Process, and Exit.

The Importance of Change Management

Effective change management, how changes to how your organization operates are handled, is crucial when upgrading your BOS. Here are some points for effective change management:

- **Minimize resistance and enhance adoption** — Change management is critical to reduce resistance and foster acceptance of your BOS. People are often resistant to change due to fear of the unknown or potential disruption of their routines. Change management aids in mitigating these fears by educating team members about the benefits of your BOS and Ninety while guiding them through the transition process.

- **Efficiency and effectiveness** — Successful change management ensures a more [efficient and effective](#) implementation of your BOS. This is because a well-structured plan identifies potential pain points and barriers beforehand and devises strategies to overcome these challenges. In this guide, we've given you resources and steps that have worked well for thousands of companies that have successfully rolled out Ninety.
- **Alignment with business goals** — A crucial aspect of change management is ensuring that your new BOS aligns with the company's strategic goals. It does this by facilitating Ideal Stakeholder buy-in, understanding the impact on processes, and ensuring the upgrade simplifies the hard work of building and scaling a great organization. This is why Ninety is so powerful — our platform aligns your entire team around your BOS and vision.
- **Boost team member morale and productivity** — By involving team members in the change process, providing them with necessary training and resources, and communicating effectively about the changes, change management can enhance team member morale and productivity. When team members feel supported and prepared for a change, they're more likely to engage with and use your new BOS to its fullest potential.
- **Manage expectations** — Change management also helps manage expectations. By providing clear communication about what your new BOS running on Ninety can do, how it will be implemented, and what team members can expect during and after the transition, you reduce ambiguity and create a smoother transition.

Final Tips

Rolling out Ninety company-wide takes concerted and consistent effort to do well. Here are a few additional tips to help your rollout go as smoothly as possible.

Celebrate Small Wins

- Recognize and celebrate the success of individuals and teams who adopt Ninety and demonstrate its value. This will encourage others to fully embrace the platform and your BOS.
- Use your existing channels to celebrate small wins. Real-time channels such as Slack or Teams work great for this.
- Highlight stories in your live team meetings. Have folks report small wins from your rollout during the Segue or Headlines sections of WTM and celebrate together.
- Reward team members who go above and beyond to take full ownership of the rollout. Consider recognizing them in a quarterly [State of the Company Meeting](#).

Get Help from a Coach or Implementer

Most [business coaches](#) tell their clients to reach out between sessions, but clients often wait until their next in-person session to cover any questions. Instead, when you're getting stuck, reach out between sessions — coaches are there to support you in your journey, not just on session days.

Issues Are Good

- Don't be alarmed if issues start coming out of the woodwork. It's a natural part of upgrading your business operating system and demonstrates growth in the Stages of Development. Team members may have been reluctant to bring up issues before if they felt nothing would be done, it would result in more work on their plate, or there was a lack of accountability and follow-through for change to be made.
- Work through and cascade any rollout-related issues during your WTM. Trust the agenda provided by your BOS and avoid half measures. Your BOS will work for you if you use it effectively.
- Add any issues to your list and discuss them with your team to find the root cause. Then, decide on a solution and assign someone a To-Do outlining the next actions. The issue-solving framework in 90os is called [Raise, Discuss, and Resolve](#) (RDR).

Every Rollout Is Different

- Not every team and team member will handle rollout the same. You might have a great experience at the SLT level but then struggle elsewhere. That's entirely normal.
- Ask a leader from an effective team to be a mentor and coach to your new team's facilitator as they roll out Ninety and your BOS to their team.

Reach Out to Ninety

- We've said it a few times already, but it's incredibly important for you to know how much we're genuinely invested in your success. Our team is well-versed in Ninety and various BOS options – and we're always happy to help.
- When you're stuck and can't seem to solve your rollout issues, simply open the chat, type in your question, and a Client Support Specialist will help you.
- We also have a thorough and up-to-date [Help Center](#) where you can search for answers to any questions related to the Ninety platform.
- Want to suggest an improvement or give your opinion on a feature? Click **Provide Feedback** within the Ninety platform to tell us what you think! We're always looking for ways to improve our software and provide the features you need to build a great organization.

Checklists

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ROLLOUT

Step 1: Start with your Senior Leadership Team.

Step 2: Then, roll out to your entire company.

Step 3: Set a cycle of learning and improvement.

Step 1: Start with your Senior Leadership Team.

- ☐ Give your SLT time to set your strategy and meet consistently
 - ☐ Be sure to cover introductions to each of the following:
 - ☐ Stages of Development
 - ☐ Hitting the Ceiling
 - ☐ Business Operating Systems
 - ☐ The Power of High-Trust, Agreements-Based Cultures
 - ☐ BOS Coaches
 - ☐ Ninety
 - ☐ Weekly Team Meetings
- ☐ Take the Baseline Assessment
 - ☐ Decide if you're ready to upgrade your BOS
 - ☐ Decide if you want to hire a coach

☐ Get to work on your:

- ☐ Vision
- ☐ Goals
- ☐ Org Chart
- ☐ Scorecard
- ☐ Meetings

☐ At about 60 days in, it's gut-check time:

- ☐ Your SLT is solid on the basics of Ninety and your BOS
- ☐ You're committed to upgrading your BOS
- ☐ You're committed to using Ninety
- ☐ SLT QPMs and APM are on the calendar

Step 2: Then, roll out to the entire company.

- ☐ Choose a champion
- ☐ Create a Company Rollout Rock
- ☐ Hold a State of the Company Meeting with the entire organization
 - ☐ Let everyone know you're upgrading your BOS and why
 - ☐ Let your company know that you've decided to upgrade your BOS and that it's going to take some time — about 12 to 18 months
 - ☐ Share the benefits of a cloud-based, holistic, and fully integrated BOS
 - ☐ Share your vision, goals, and Org Chart with the entire organization
 - ☐ Provide resources: 90u Library, internal contacts or coaches, and any additional learning material from your BOS
- ☐ Roll out your BOS to your next level down — or a select number of departmental teams — continuing to roll out to every level of your organization when the level before is solid on the basics of Ninety and your BOS
 - ☐ Continue to map out your rollout levels and timing
 - ☐ Have your Rollout Rock owner continue to monitor your progress
 - ☐ Set a Rollout Rock for each level or team until everyone is onboarded

POST-ROLLOUT CHECKLIST

After you've rolled out Ninety and your BOS to the entire organization, review this checklist to help confirm a successful rollout:

Step 3: Set a cycle of learning and improvement.

- ☐ All team members are in your Ninety Directory.
- ☐ Each team member is assigned to one or more teams.
- ☐ The Org Chart is updated with current Seats and the open Seats you're hiring for over the next 3–12 months.
- ☐ Every Seat has the 5–9 roles, accountabilities, and responsibilities that define how it serves the organization.
- ☐ Weekly Team Meetings are occurring at all levels and rated 9 or above.
- ☐ Teams have solid Scorecards and Rocks and are solving issues.
- ☐ Every Seat has 3–7 KPIs that help us see all is well.
- ☐ Teams cascade any items up and down appropriately.
- ☐ Quarterly Planning Meetings are occurring at needed levels.
- ☐ Annual Planning Meetings are occurring at needed levels.
- ☐ You're holding quarterly State of the Company Meetings.
- ☐ Departmental plans are set and communicated each quarter.
- ☐ You have fluid, open, and honest communication at every level.
- ☐ You have solid processes in place, and your team uses them.
- ☐ You're completing your Rocks at a higher rate as you grow.
- ☐ You're completing your goals and seeing positive impact.
- ☐ Leaders are holding quarterly one-on-ones with their direct reports.
- ☐ You're building a high-trust, agreements-based culture that positively impacts teams.
- ☐ You're seeing a positive impact on all of your Ideal Stakeholders.
- ☐ Your Org Fitness assessment score has increased across all 9 Core Competencies.
- ☐ You've made progress in the Stages of Development.
- ☐ You have an integrated business operating system running on Ninety.

Takeaway

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Upgrading a business operating system with Ninety is a proven method for improving how organizations operate. Take advantage of these benefits by rolling out your BOS and Ninety to every team. With appropriate change management, preparation, and help, you can successfully transform your way of doing business and usher in a new era for your organization — one in which all your team members are focused, aligned, and thriving.

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 our [90u Library](#).

TRY NINETY TODAY

We're Here to Help

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.

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 Programs and Events** | <https://www.ninety.io/resources#events>
 - » [Getting Started with Ninety Workshop](#) — 6 live sessions to help you have a successful onboarding experience
 - » [Company-Wide Rollout Workshop](#) — 4 live sessions to help you use Ninety throughout your organization



Key Terms

- **Business Operating System (BOS)** — An organized set of concepts, tools, and disciplines describing how an organization operates.
- **BOS Coach or Implementer** — An experienced guide who teaches a BOS to an individual or team.
- **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.
- **Change Management** — How an organization systematically handles operational changes, including adaptations to goals, processes, technologies, and more.
- **Focus Filters** — The essential elements of an organization’s vision. Each decision a team member makes should be aligned with these organizational commitments.
- **Compelling Why** — A Focus Filter of your Vision that includes the reason your organization exists, the powerful emotions that influence you, and/or a future state so appealing that you’re willing to go the extra mile to work toward it.
- **Senior Leadership Team (SLT)** — The highest-level team in an organization, including the visionary/CEO, the second-in-command, and the heads of departments.