**Tactic: Roadmap & 90-Day Action Plan**

*Move from big‑picture goals to concrete near‑term action by defining a future milestone, working backward to identify what’s needed to get there, and inviting clear commitments from participants.*

**When to Use It:**   
Use when a group needs to turn vision into execution—typically toward the end of a convening. It’s especially useful when the group is ready to set shared milestones, identify clear next steps, clarify ownership, and establish the collaboration cadence post-convening.

**How it Works:**

**Step 1 (60 minutes) | Roadmapping**

* **Customize the worksheet:** Use the attached worksheet as either a"follow along" guide for participants during the discussion, or as a facilitator guidance document for setting up flip charts/whiteboards in the room.
* **Start at the end**: Ask, “*What do we hope to have achieved by the end of [insert timeframe]?”* Capture a clear, specific milestone. If there are no natural milestones or big global moments in the evolution of the work, try one year.
* **Pull planning**: Working backwards from that milestone, map out where the group needs to be at the end of each quarter.
* **Identify key workstreams**: Name the major streams of work required to reach those milestones.
* **Identify missing stakeholders**: Name those who are not in the room, whose contributions will be critical to moving this work forward.

**Step 2 (45 minutes) | 90-Day Action-Planing**

* **Collaboration structure:** Determine whether work will be centralized, decentralized, or divided into working groups.
* **Meeting cadence:** Decide how often you will meet in the first 90 days.
* **Timelines:** Pull up calendars and agree on meeting dates, key deadlines, and any shared checkpoints. Record those deadlines.

**Step 3 (30 min) | Making Commitments Individual commitments**

* **Walk up to the roadmap:** Each participant adds their name next to the workstream(s) or first steps they commit to.
* **Review together:** As a full group, review the commitments out loud, name gaps, and next steps.

### **Helpful Tips:**

* **Create a roadmap.** Use a large wall, flip chart, or digital whiteboard for the roadmap and 90‑day plan so participants can literally “walk up” and add their names.
* **Begin with an end goal.** Start with the end‑of‑year milestone—this creates focus and avoids overloading the plan with non‑essential tasks.
* **Log commitments.** Assign someone to document the roadmap and commitments in real time so there’s a clear artifact to reference and send out as a follow-up after the session.

