



GLASSROOT PARTNERS

The Glassroot Method

How we help companies turn a strategy into work that gets done.

We write the strategy with your leadership team and build the systems that run it. Every engagement follows the same four steps, in the same order.



WHY THIS METHOD EXISTS

Where company plans stall

Most companies we work with already have a strategy. It usually stalls in one of four places. Each step of our method exists to prevent one of them.

WHERE THE PLAN STALLS

The wrong problem gets solved

The plan answers the question someone brought in. The problem that is slowing the company down never gets named.



THE STEP THAT PREVENTS IT

STEP 1

Find what's true

We name the real problem, and your leaders agree on it, before anyone writes a plan.

Leaders agree, then go separate ways

Nobody wrote down who owns which decision, so decisions get reopened and each leader works toward a different version of the plan.



STEP 2

Write the plan with you

Your leaders write the plan together and sign off on who owns what.

Tools come before goals

Software and AI projects go to IT. IT automates how the company works today, the tools do not fit where the company is going, and people return to the old way.



STEP 3

Build what the plan calls for

We build only the systems the signed plan names.

Nobody keeps the plan moving

The consultants leave, the plan sits in a document, and the work depends on whoever remembers it.



STEP 4

Run it, then hand it over

We run the plan with your team until one of your people owns it.

THE FOUR STEPS AT A GLANCE

What happens, what you have at the end, and who leads

Each step ends with something your company keeps. Read across to see how an engagement moves; read down to see one step.

	1	2	3	4
	Find what's true	Write the plan with you	Build what the plan calls for	Run it, then hand it over
WHAT HAPPENS	We listen, tell you what we think the real problem is, and talk with each of your leaders on their own.	Your leadership team writes the plan with us, meeting every week. Nothing gets built yet.	We build the systems the plan names and train the people who will use them.	We run the plan with your team, keep the systems working, and coach the leaders carrying it.
WHAT YOU HAVE AT THE END	A written statement of the real problem that your leaders agree on	A signed plan: priorities, owners, decisions, sequence, team, and the systems you need	Working systems your people use every day	A plan still in use months later, owned by someone on your team
WHO LEADS	MATT MIKE	MATT MIKE Matt runs the sessions. Mike scopes the systems.	MIKE MATT	MATT MIKE
NAME leads the step NAME supports it				

1 Find what's true

STARTS IN THE FIRST CONVERSATION

In the first conversation, we listen, then tell you in plain words what we think the problem is. You correct us where we are wrong.

Before anyone writes a plan, we talk with each of your leaders one on one. People say different things when their colleagues are not there, and the gap between those answers is often the real problem. We also look at the numbers and at how work moves through the company today.

YOU LEAVE WITH

- A written statement of the real problem, agreed by your leadership
- A clear answer on whether we should work together

2 Write the plan with you

YOUR LEADERS WRITE IT. WE GUIDE IT.

We meet with your leadership team every week. We ask the questions, test the answers, and keep the work moving. Your leaders write the plan, which is why they defend it later.

We do not build anything in this step. When a company builds before its leaders agree on the plan, it ends up with tools nobody uses.

THIS STEP ENDS WHEN

Your leadership team signs off on a plan they wrote, and you know the size of every system before you decide what to build.

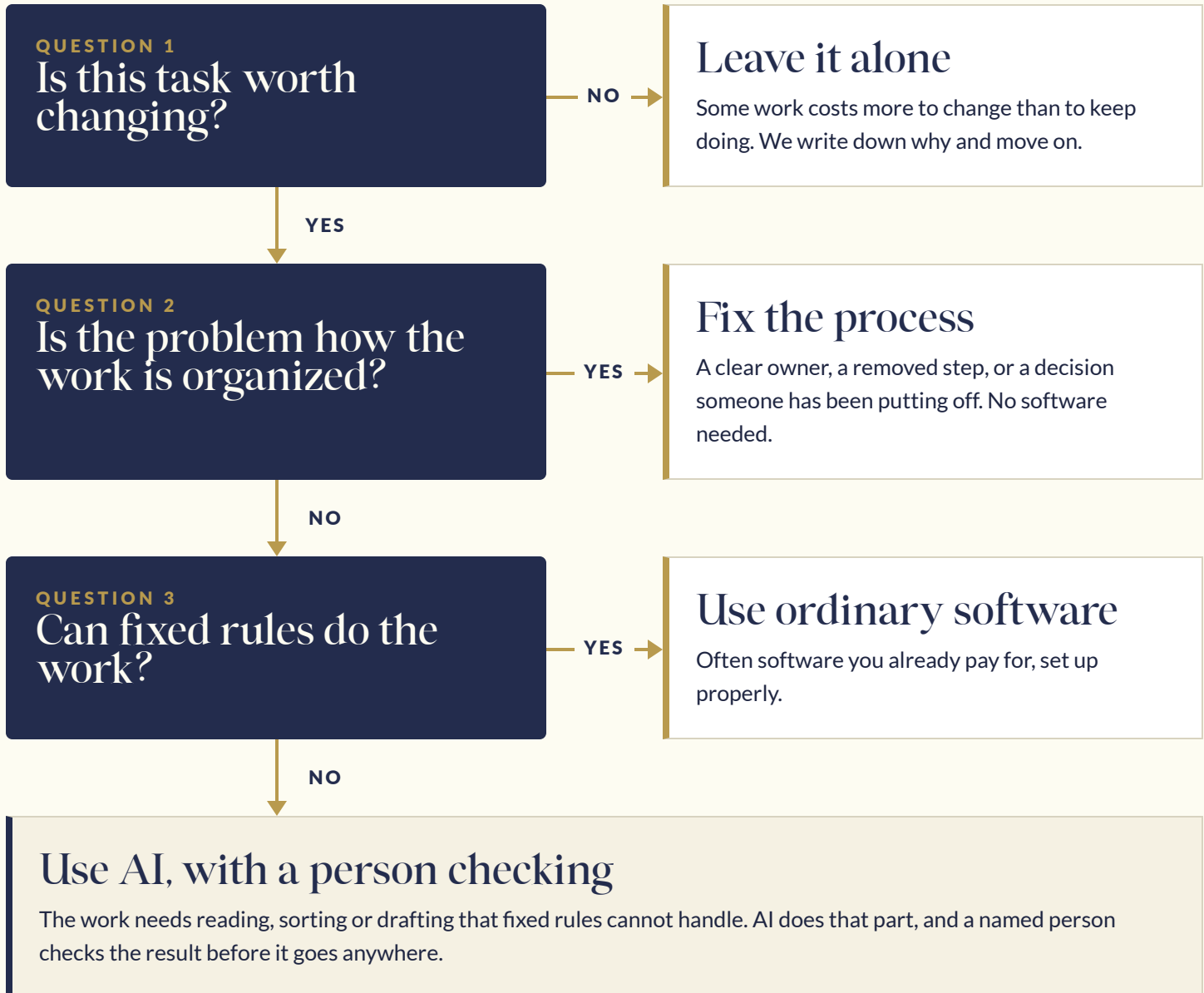
WHAT THE PLAN CONTAINS

- | | | |
|---|------------------|---|
| 1 | Direction | Where the company is going, and what it will stop doing to get there |
| 2 | Ownership | Who owns each priority, and who makes which decisions |
| 3 | Sequence | What happens first, second and third |
| 4 | Team | Which roles to add, change or remove |
| 5 | Systems | Each system the plan needs, scoped so you know its size. The next page shows how we decide what belongs here. |

INSIDE STEP 2

How we decide what to build

We list the tasks that take the most time across your company and run each one through the same three questions, in this order. AI comes last on purpose: most work gets better with a clearer process or ordinary software first.



The result is a written list: every task, where it landed, and the reason. That list decides what gets built in step 3, and what does not.

3 Build what the plan calls for

ONLY THE SYSTEMS THE SIGNED PLAN NAMES

We build the systems in the plan and nothing else, so you are not briefing a developer or waiting on IT. Most are practical: a tracker that replaces a spreadsheet, a report that assembles itself each week, a dashboard your leaders can read in one look. We use AI where it saves real time. Some tools answer one question for one decision. Those used to cost too much to build. Now they do not.

YOU LEAVE WITH

- Working systems in your company, used by the people the plan named
- Training for those people

Nothing acts on its own

No system signs, sends or pays anything without a person approving it.

Every number traces back

Each figure on a screen links to the records it came from in your own systems.

4 Run it, then hand it over

UNTIL SOMEONE ON YOUR TEAM OWNS IT

Plans usually fail in the months after they are signed, when nobody is keeping them moving. So we stay. We run a regular meeting rhythm, keep a live scoreboard in front of your leaders, coach the people carrying the plan, and keep the systems working.

We train one person on your team to own the plan. Once they can run it, we hand it over with written documentation and stay available for the decisions that need judgment.

YOU LEAVE WITH

- A plan still in use months later
- A named owner on your team
- A partner for deciding what to build next

HOW THE HANDOVER WORKS



THE RULES WE HOLD TO

What we will and will not do

We hold to these even when a client asks us not to. They are grouped by when they apply.

BEFORE WE BUILD

How we decide what the work is

We decide before we build

Nothing gets built until your leadership has agreed where the company is going.

We tell you what not to build

We will advise against some things you ask for, and we will say so before any work starts.

Your leaders own the plan

We guide and challenge. Your leaders write it and sign it.

WHILE WE BUILD

How the systems behave

A person approves what goes out

AI can read, sort and draft. A named person checks anything before it reaches a customer, a board or a bank.

Numbers come from your records

AI can write the question. Your own data provides the answer, and every figure links back to its source.

We build for the daily user

Each tool does a few things well and is simple for the person who uses it every day.

THE WHOLE WAY THROUGH

How we hold ourselves to account

We name what is outside our work

Legal and compliance sign-off stay with your own counsel. We are not an on-call IT desk. We say this at the start.

We measure what is still running

Our test is whether your team is still using the plan and the systems months later.

WHO YOU WORK WITH

Two people, from the first conversation to the handover

Matt leads the conversation with your leadership. Mike does the analysis and builds.

Both of us stay involved at every step.

	1 FIND WHAT'S TRUE	2 WRITE THE PLAN	3 BUILD	4 RUN IT
Matt	LEADS Runs the first conversations with your leaders	LEADS Runs the weekly sessions	SUPPORTS Keeps your leadership involved	LEADS Coaches the leaders carrying the plan
Mike	SUPPORTS Reviews the numbers and how work moves	LEADS Scopes and sizes every system	LEADS Builds the systems and trains your people	LEADS Keeps the systems working and trains your owner



Matt George

CO-FOUNDER

Ran one of Illinois' largest social-impact organizations as CEO for thirty years. Spent five years coaching senior executives at Harvard Business School, and now leads a Vistage group of chief executives.



Mike Silvestri

CO-FOUNDER

CPA who started at PwC, then worked as a COO and a Chief of Staff. He works out what a plan needs, sizes each system, and builds the systems that run it.

WHY ONE FIRM DOES BOTH

Most firms either advise or build. When one firm writes the plan and another builds it, the reasons behind the plan get lost between them. We do both, so the people who help write your plan are the people who build it and run it with you.

THE METHOD IN PRACTICE

One company, five requests

The leadership of an industrial company asked us for five systems. Each of its chief executive, CFO, COO and head of strategy had one in mind. We sorted all five before building anything.

1 A weekly funding report

For the head of strategy. It screens public funding sources every week and says plainly what still needs checking.

RUNNING

2 One place for operating knowledge

For the COO. Being built from a diagram he drew himself.

BEING BUILT

3 Invoices routed to the right approver

For the CFO. He set the approval rules before any code was written.

DESIGNED

4 Scenarios on the CEO's phone

Designed, and waiting until the numbers match across the businesses he owns.

DESIGNED

5 An assistant reading the CEO's email

The easiest to build and the one they wanted most. It would have read sensitive information during an open audit, so we advised against it before any work began.

NOT BUILT

The fifth decision shows the method at work: agree on the goal first, sort the work, and say what not to build. Every system on our capabilities page is running for a client today.

Start with a conversation.

Tell us what is stuck. We will tell you what we think the real problem is, and whether we are the right people to help.

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