

The Pivot Playbook

Keep moving. Every step gets an owner and a date. No open-ended "we'll figure it out."

PART 1 · THE 90-DAY PIVOT PLAN

CASH TODAY

MONTHLY EXPENSES

MONTHS OF RUNWAY

PLAN START DATE

THE NEW DIRECTION IN ONE SENTENCE

WHAT STILL WORKS AND WE'RE KEEPING

WHAT STOPS NOW

Step	Timing	Next action	Owner	Due	Done
1 Face the numbers	DAYS 1-3				☐
2 Stop the bleeding	WEEK 1				☐
3 Define the new direction	WEEKS 1-2				☐
4 Map the work the plan needs	WEEK 2				☐
5 Make the people decisions	WEEKS 2-3				☐
6 Tell people, in the right order	SAME DAY				☐
7 Roll out in phases	WEEKS 3-12				☐
8 Review and adjust	EVERY 30 DAYS				☐

TRIPWIRES FOR THE PIVOT

If

by

then

If

by

then

If

by

then

Role Review

Design the team around the new plan. Review the role first, then the person.

For each role or task area, decide whether the new plan needs it, how much is repetitive, and how much needs human judgment. Then choose the outcome. Keep = core work done by people. Redesign = hand the repetitive part to technology and refocus the role. Cut = the new plan doesn't need it.

Role or task area	Monthly cost	Needed? yes / some / no	Repetitive? most / some / little	Judgment? a lot / some / little	Outcome keep / redesign / cut	Who fits / notes
TOTALS	Keep	Redesign	Cut	Est. monthly savings		

Decide in one round if you can. Repeated rounds of cuts destroy the trust of everyone who stays.

People Changes Checklist

Decide for the business. Deliver it like a human.

BEFORE YOU DECIDE

- ☐ The decision is based on what the new plan needs, not loyalty, seniority or guilt.
- ☐ Roles were reviewed first, then people were matched to the roles being kept.
- ☐ Checked whether anyone affected could move into a role we're keeping, with training.
- ☐ Talked to an employment attorney or HR professional about notice rules, final pay and benefits where we operate (larger layoffs can trigger rules like the U.S. WARN Act).
- ☐ The criteria are written down and applied the same way to everyone.

PREPARE THE CONVERSATION

- ☐ Each person will hear it privately, in person if possible, from me or their direct manager.
- ☐ Final pay, benefits information, return of equipment and last day are ready in writing.
- ☐ Access to systems will be changed at the right time, handled respectfully.
- ☐ Decided what support we can offer: reference, introductions, help finding work.

TELL PEOPLE, IN THIS ORDER, ON THE SAME DAY

- ☐ 1. People affected by the layoff, privately.
- ☐ 2. The rest of the team: why, what's changing, what isn't, and what happens next.
- ☐ 3. Clients: what improves for them and who their contact is now.
- ☐ Prepared answers for the questions people will ask. No guessing, no promises we can't keep.

NOTES FOR THE TEAM ANNOUNCEMENT

General education only. Rules vary by location. Get professional advice before making staffing changes.

Technology and AI Rollout

Hand repetitive work to tools. Keep people on judgment, trust and relationships.

Task to hand off	Tool or AI	Who checks it	Hrs saved/mo	Monthly cost	Tripwire: drop it if...

SETTING UP AN AI TOOL FOR A TASK

- ☐ Write the process down step by step.
- ☐ Collect 3–5 examples of good finished work.
- ☐ Write clear instructions: what to do, what to avoid, the format.
- ☐ Test it on real work. Compare with a person's result.
- ☐ Fix the instructions and test again.

BEFORE GOING LIVE

- ☐ A person reviews anything going to a client.
- ☐ Anything involving money is double-checked.
- ☐ Checked what the tool does with private data.
- ☐ Staff are trained to use and check the tool.
- ☐ A tripwire and a review date are set.

A computer is only as good as the person using it.

Technology follows instructions, and AI can give confident answers that are wrong. Someone has to set it up, check it and own the result. Use tools to free your people for the work machines can't do: judgment, trust, hard conversations and relationships.

TRAINING PLAN FOR THE TEAM