

IDEA System Implementation Roadmap

Cross-Pillar | Tool 32 | swirltoscale.com

You don't install the IDEA System all at once. You build it in sequence—one pillar, one tool, one habit at a time. This roadmap gives you a phased approach to implementing the full system over 90 days, starting with the foundation (Purpose) and building upward.

"Don't try to build the whole system in a week. Build one habit at a time. The goal isn't speed—it's permanence."

— From Swirl to Scale

Company

Implementation Lead (System Steward)

Start Date

Phase 1: Foundation — Weeks 1–3

Build the identity foundation. Everything else rests on this.

When	Action	Who	Done?
Week 1	Complete Purpose Statement Worksheet	Visionary + Navigator	
Week 1	Draft Vision & Mission Statements	Leadership team	
Week 2	Run Core Values Exercise	Full leadership team	
Week 2	Complete Visionary/Navigator Assessment	Founder + #2	
Week 3			
WEEK 3			

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When	Action	Who	Done?
Week 5	Set up Idea Bank	System Steward	
Week 5	Run Focus Goal Filter on current initiatives	Leadership team	
Week 6	Complete RAPID Worksheet for 2–3 key decisions	Decision owners	
Week 6	Review & finalize all Plan Pillar tools	System Steward	

Phase 3: Rhythm — Weeks 7–9

Install the execution engine. This is where the system becomes real.

When	Action	Who	Done?
Week 7	Build Company Scoreboard (5–8 outcome metrics)	Leadership team	
Week 7	Build Team Scorecards (3–5 predictive metrics each)	Team leads	
Week 8	Launch Weekly Progress Meeting (30 min)	System Steward	
Week 8	Set up Weekly Issues List	System Steward	
Week 9	Schedule full Meeting Cadence (weekly/monthly/quarterly/annual)	System Steward	
Week 9	Run first Monthly Alignment Review	Leadership team	

Phase 4: People — Weeks 10–12

Get the right people in the right seats with clear agreements.

When	Action	Who	Done?
Week 10	Build the Roles Chart (structure first, then names)	Leadership team	
Week 10	Create Role Profiles for key seats	System Steward + managers	
Week 11	Draft Operating Agreements for each team	Team leads	
Week 11	Complete People Fit Framework assessment	Leadership team	
Week 12	Complete 9-Box Talent Matrix (if 50+ employees)	Leadership team	
Week 12	Review & finalize all People Pillar tools	System Steward	

After 90 Days: Sustaining the System

The first 90 days install the system. What keeps it alive is the rhythm. After implementation:

- Weekly Progress Meetings never get cancelled
- Monthly Alignment Reviews happen every month
- Quarterly Resets recalibrate goals and review People Fit
- Annual Reset resets the full cycle (vision, plan, people, tools)
- The System Steward owns the cadence and holds people accountable to it

What's the single biggest risk to our implementation momentum?

Who will hold us accountable if we start skipping the rhythm?