Turning on a Dime

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Using the right data points to predict success and simplify messaging for loyalty, promotions, as well as crisis response

There are various ways you can think about the phrase “turn on a dime” - the expression itself means to respond quickly with limited options or space - something that many co-ops can relate to. You can also consider the phrase from a monetary perspective - How do you *turn on* a dime? Increase profits and increase your marketing reach?

The DIME process

Goal - State your goal simply and prepare to expand

Define - Explore what is happening and define the business need

Investigate - Find the story in the data

Message - Use a clear message to drive sales

Examine - Follow through and judge success

Summary

In the Turning on a DIME session, the senior leadership team from the Belfast Community Co-op will explore each step of the DIME process and encourage attendees to apply what they learn during the session using a complementary workbook (available both physically and digitally) that they may bring back to their co-ops to share with their teams and peers. Prepared for CCMA 2026

To download materials, visit **belfast.coop/dime** Contact us: **info@belfast.coop**

Contents

- **Example goal - Launching a loyalty rewards program** – pg. 3
    - Goal
    - Define
    - Investigate
    - Investigate results
    - Message
    - Examine
    - Summary
- **Work through your own goal** – pg. 7
    - Goal
    - Define
    - Investigate
    - Investigate results
    - Message
    - Examine
    - Summary
- **Additional Resources** – pg. 18
    - Pre-Mortem meeting Instructions

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The DIME process in action

To illustrate the DIME process, Belfast Community Co-op team will walk through a project that follows this method. The example for today's presentation is based on the launch of a loyalty rewards program.

Please feel welcome to take notes about this project as we walk through it.

Goal - State your goal simply and prepare to expand

- Goal, stated simply
- Why - Ensure it speaks to your ends or core values
- Who - Know the community impact
- Why - Ensure the goal answers a business need.

Define - Explore what is happening and define the business need

- Where did the goal come from - Person and situation
- Why are we doing this - more context
- Break down the goal sentence - define each word
- Define your triangle – Scope, Time, Budget
- Who is your team
    - Decision making and update method
- What is out of scope

Investigate - Find the story in the data

- What were you not able to answer in Define
- Sentence breakdown - what needs data
- Where is the needed data
- Deadlines for data review and follow-up
- Worth noting and caveats to reporting
- Did any assumptions and subconscious bias surface that need to be explored

Investigate Results

Message - Use a clear message to drive impact

- Review the Investigate Results
- Review The Who
- How are you saying it
- Is there small print
- Is it repeatable?
- Communication plan (internal and external)

Examine - **Follow through and judge success**

- What metrics will gauge success
- What does success look like?
- How to celebrate success

Summary

- Look back at your goal in section 1. Have you maintained focus on your Why, Who, Why?
- Does the data support the goal?
- Were your assumptions proven or disproven?
- Pre-mortem

Work on your own goal!

During today's session, you will work on a goal or project that you have been thinking about – There will be writing sessions followed by sharing out for the **Goal**, **Define** and **Investigate** sections. Then you will take this workbook back to your co-op and finish the project with your team! The prompts for **Message**, **Examine** and **Summary** will help you communicate the process with your team.

Goal - State your goal simply and prepare to expand

Effective goal setting moves past abstract, high-level vision statements and focuses on tactical, action-oriented goals. Rather than defining *why* a co-op exists, this framework addresses how the co-op actively lives up to its purpose through execution (e.g., launching a loyalty program or responding to shifts in SNAP benefits). By anchoring operational targets in the SMART (Specific, Measurable, Achievable, Relevant, Time-bound) criteria and the DIME process, teams can focus on initiatives with distinct beginnings and endings.

A well-formulated goal must be easily summarized in one or two sentences yet be backed by operational clarity. If you expect a team to successfully execute a goal, you must provide the context and definition required to align their efforts with your initial vision.

Why, Who, Why

When evaluating and refining goals within a cooperative business model, consider your goal from three interconnected lenses: Your Values, Your Community, and Your Business Need. – Why, Who and Why.

The First "Why": Core Values & Ends

Every goal must directly align with the co-op's established Ends Policies and core values. Before launching an initiative, ensure that you can clearly articulate how it supports these foundational principles, and verify that the ultimate outcomes can be concretely measured and reported on in your annual Ends Report.

The "Who": Community Impact

In traditional business, this is defined as the "user experience" or "audience." In the co-op sector, it represents *community impact.* Determine exactly who is affected. Is it low-income shoppers, environmentally conscious consumers, staff members, local government, or a combination of overlapping groups? Also, avoid defining your "Who" too broadly (which dilutes real connection) or too narrowly (which accidentally excludes important demographics). Your community is your core purpose.

The Second "Why": Business Need

A goal must serve a tangible operational purpose and pinpoint exactly what the goal is solving, improving, innovating, or changing.

Goal - State your goal simply and prepare to expand

Goal summary – One or two sentences that summarizes what you want to accomplish

Why
Ensure it speaks to your ends or core values

Who
Know the community impact

Why
Ensure the goal answers a business need

Define - Explore what is happening and define the business need

A successful project requires taking a simple, one-sentence goal and uncovering context, constraints, and stakeholder roles.

Person and Solution – Identify the person who created the goal, so you can ensure you have their perspective. Sit down with the stakeholder to align on intent. Establish requirements by asking simple, clarifying questions. Get the reasoning and why the goal was chosen established. You can also break down the goal sentence word by word to expose missing requirements.

Scope Management & Preventing "Scope Creep" - Projects with momentum naturally inspire people, which often leads to stakeholders attempting to tack on "just one more thing". To ensure a project reaches the finish line, spend time defining what is in scope and what is out of scope. Draw a hard boundary early and hold true to it to prevent the project from becoming unruly.

Team - Once project requirements are clear, you must map out your team, their roles, and how information will flow to them. Clearly distinguish between the primary decision-maker, the core execution team, and people who will be impacted by any workflow change.

The "Iron Triangle" - Defining a goal means successfully mapping out the Iron Triangle—the three interdependent constraints that govern every project: Scope (requirements), Time (deadlines), and Cost (budget and labor). Because these sides are interconnected, modifying one inevitably forces a change in another. For instance, accelerating a deadline (Time) requires either increasing expenses (Cost) or cutting features (Scope). When details of the triangle are missing, write out exactly why the variable is unknown.

Person

Where did the goal come from? (answer both)

Situation

Why is this the solution to the situation?

Why are we doing *this specifically*? - get more context

Break down the goal sentence

Define all significant words in your goal sentence

The Iron Triangle

Scope

Time

Cost

Who is on the Team?

Who is doing the work and who is impacted by the work?

What is out of scope?

Investigate - Find the story in the data

The Investigate phase focuses on identifying, gathering, and analyzing data to inform and validate your goal. Ultimately, data investigation should directly address the "missing pieces" identified in the Define phase.

Know your assets as well as how information is categorized, and who within the organization possesses the technical expertise to extract it. Such as POS data which provides transactional information, product inventory metrics, owner information and employee details. When combined with bookkeeping and accounting software, it shows us a large picture of the co-op and the community

Historical and Formalized Reporting - Key performance indicators (KPIs) tracked monthly offer critical historical baselines. If your team frequently seeks a specific data point, formalize its collection into a standard, repeatable process so it is readily available for future investigations.

Maintaining Data Integrity and Providing "Backstories" - Data is rarely self-explanatory; numbers require qualitative context to be truly actionable. Clean Data and "Caveats": Prioritize data hygiene, but always identify the limitations or anomalies within a dataset.

Cognitive Bias - It is common to assume the results of an investigation before looking at the data. Pinpoint those assumptions and allow the time and space to look at data neutrally, remaining open-minded enough to let the data prove initial hypotheses either right or wrong.

What Data Do You Need - Look at the missing pieces from the Define section to dictate exactly what you need to research. The gaps in that initial goal statement form the roadmap for your data search.

Set Review Deadlines - Formally set clear deadlines for data review and follow-up. If a piece of data will alter the project's direction or messaging, ensure it is analyzed before execution begins so decisions are grounded in evidence rather than assumptions.

What information in your goal sentence needs clarification and data?

What words in your sentence breakdown or iron triangle needs data to complete?

Where are can you find that data (if known)

Data needed	Where to find it

Due date for data review

Known Caveats or Worth Noting

Assumptions to validate

Message - Use a clear message to drive impact

The execution of any project or goal relies heavily on how it is communicated. A clear, deliberate message drives impact by aligning stakeholders and securing buy-in.

Investigate Results – Review the results and pinpoint how that informs your goal and message. Ensure your messaging is grounded in in the information uncovered during the Investigate phase. Avoid crafting messages based on emotional assumptions or personal biases; rely on verified data timelines to validate that your communication strategy is targeting the real need.

How are you saying it - As a project comes to life, the primary objective is to facilitate immediate understanding. In an attention-starved society, excessive details diminish engagement and confuse stakeholders. The public-facing message requires a tight, succinct, one-sentence goal. Streamlining the message ensures it is memorable and actionable. This is your “Brief” message. Additional information may be needed when a project is first launched – addressing change and celebrating innovation. This is your Launch message. You will also have the “elevator pitch” message – which goes into more detail and builds the idea out more fully for your audience.

Review the Who - The average American reads at a 7th-to-8th-grade level. Messaging should avoid complex jargon or vocabulary contests. Focus instead on clear, accessible language that makes an honest, immediate connection to serve the goal. Assess what medium best serves the message. Determine if the rollout requires static text, graphic design, engaging video, supplementary materials (like maps), or interactive staff training. Keep your audience (the Who) in mind as you’re crafting your message.

Communication Plan - A successful communication plan recognizes that different stakeholders require different levels of information. Overloading an audience with irrelevant minutiae destroys engagement. Leadership (General Managers, Boards, Upper Management) requires the full business case, data foundations, and strategic details to govern effectively. Frontline Workers & Staff require specific, actionable information to perform their roles and support the rollout. They need to know how workflow changes affect them and often need some view into the "why" for the change to settle. Customers & Public Audiences require clear expectations of how the change impacts them directly. Stagger communication strategically. Internal staff must always be updated and trained before any information is launched to external customers.

The "Fine Print" & Repeatability - Establish whether this is a unique, one-off campaign or a repeatable program that requires standardized legal phrasing, policies, or "fine print" such as coupon use terms.

What were the results of the Investigate stage?

Review the Who

Who is your audience?

How are you saying it?

Brief

What is the short sentence you will use in promotional messages

Launch

Is there a specific message that needs to be conveyed at the start

Long Form

More details about what you're doing – the "elevator pitch"

What is the small print?

Is it standard – does it already exist somewhere?

Is it repeatable?

Will this be a template for future similar projects?

- [ ] **Yes**
- [ ] **No**

Communication Plan

Internal

External

Examine - Follow through and judge success

Examine is about metrics that matter. Metrics are the data driven numbers that tell you how your goal or project (or business) is doing. This is where Measurable comes in from your SMART goals. It establishes clear parameters for what "done" and "successful" mean before launching an initiative - creating an organizational culture rooted in continuous learning, curiosity, and accountability.

Metrics that matter - The metrics used to judge success should directly tie back to the data analyzed during the Investigate phase. Success is often determined by evaluating whether your initial data-driven predictions panned out.

Cultural Impact - Without a deliberate pause to examine metrics, organizations can only judge if a project was "done," but never if it was actually "successful." How an organization handles project outcomes fundamentally shapes its workplace culture. The Examine phase ensures that performance data is used to build team capability rather than assign blame. When an organization focuses on, measures, and speaks publicly about wins, it signals to the entire team that goals are achievable and processes are repeatable.

Destigmatizing Failure - When an initiative does not go as expected, leaders must address it directly and with curiosity. Rather than hiding failures, analyzing why a plan fell short fosters a growth mindset. When leadership models transparency, employees feel safe taking ownership when their own projects go sideways, turning missteps into collective institutional knowledge.

Establishing Baseline Benchmarks - If a project is a novel or repeating initiative, the primary metric of success may simply be establishing a baseline. The goal shifts to answering: Is this workflow repeatable? What needs to be tweaked for next time? What data would have made our initial messaging better? Reviewing hard data ensures that the results of a project can be confidently relied upon as a foundation for your next organizational goal.

Timeline - Data availability differs by project type. Some metrics will be instantly visible upon launch, while slow-burn, strategic initiatives may take months or even a year to yield measurable results.

The Commitment - To ensure accountability, metrics must be written down and tied to a timeline before the project is launched. Document what you will measure and exactly when you will measure it. Commit to holding that review space, celebrating the wins, and extracting insights from the losses.

What is the metric and what does success look like

Metric

Success is...

Timeframe for reviewing metrics

Success or Opportunity

If the project is successful, how will you celebrate?

If the goal is not successful, what is the opportunity to learn or change?

Success

Opportunity

Summary

The Summary phase serves as the final quality-assurance checkpoint before a project is greenlit for execution. It is a review to ensure the project remains aligned with the organization's core values, target audience, and business needs.

Alignment check - Before moving from planning to action, project leaders must evaluate the finalized plan against the foundational parameters established in the initial phases. This is achieved by auditing the project through the original Why, Who, Why framework:

Why: Does the completed plan still align directly with your core values? Will the final outcomes yield concrete, measurable data that you can confidently present in your annual Ends Report?

Who: Is the plan structured to effectively reach and speak to the exact stakeholder groups identified during the Goal phase?

Why: Does the plan solve the specific operational bottleneck, inefficiency, or challenge it was designed to address?

Check the data - Does your gathered research objectively support the goal, and have your initial planning assumptions been validated or disproven by the data?

Pre-Mortem - For larger initiatives, a project may benefit from a pre-mortem meeting, which engages the team to identify potential failure points and establish contingencies. While a traditional post-mortem examines what went wrong after a project concludes, a pre-mortem is a forward-looking risk assessment conducted before launch. It operates on a simple premise: assume the project has failed completely, and work backward to figure out why.

Why Who Why

Have you maintained focus on your Why, Who, Why?

☐ **Yes**

☐ **No**

Data Check

Does the data support and/or inform the goal?

☐ **Yes**

☐ **No**

Assumptions

Were your assumptions proven or disproven?

☐ **Proven**

☐ **Disproven**

Pre-mortem meeting

Is your Scope, Timeline or Budget significantly large? (if yes, do a pre-mortem)

☐ **Yes**

☐ **No**

Pre-Mortem

Pre-mortems are a great step to do once you have your plan but before starting work on your project. While we should all learn from mistakes and things going wrong, wouldn't it be nice to skip the "things going wrong" part and learn from the *idea* of things going wrong? A pre-mortem meeting will help you identify parts of your project that *could* go wrong, so that you may develop contingency plans to deal with them, should they come up.

When you have your project plan complete, but you have not yet started to do the work, bring your team together to do a pre-mortem. During a pre-mortem, you and your team will meditate on the project, the project plans and any external influences that could cause your project to go sideways or fail completely. This is the time to put on the Devil's Advocate hat and really dig in. No project plan is fail-safe!

Worth noting, the facilitator of this meeting is usually the Project Manager or primary lead on the project.

The Steps for a Pre-Mortem:

1. **Introduce** - Summarize the project with a quick requirements review (this should only be 2 or 3 minutes, so everyone gets in the mindset and is thinking about the full project). Then prepare for an open and honest discussion, imagining the project has failed. Begin this section by saying "Take a moment and imagine that we are working on the project. We are midway through and it is clear that things have gone completely wrong and the whole thing is going to fail. What happened to get us here?"
2. **Identify** - All team members describe the reasons the project failed. Write all of the examples on a whiteboard, post-its, or large paper that everyone can see. The facilitator may ask for clarification if the idea is vague or unclear.*
3. **Prioritize** - team members vote on the top 3 or 4 threats. The three threats with the most votes will be the ones you focus on in the next steps.**
4. **Strategize** - Discuss each of the prioritized threats. Figure out how to:

a. **detect** if the threat is going to happen or is happening.
b. **prevent/mitigate** the threat, if possible.
c. **respond** to the threat
d. **communicate** any plan changes if needed.

5. **Document and Communicate** - The facilitator will document all of the threats (everything that was brain stormed) as well as the top three threats with all of the strategy details that the group discussed. Some solutions may then be built into the project plan. Some solutions may be kept in a document for mitigating issues if they come up. If needed, tasks will be assigned to the appropriate Team members. Any changes to the project plan will be communicated to the appropriate parties.

*While there are "no wrong answers" in brainstorming, there *are* answers that are too vague in a pre-mortem. When coming up with what could go wrong, try to be specific. "It doesn't work" or "It fails" are not as helpful as "The door arrived broken and we have to order a new one, which takes a month. But we're already removed and destroyed the old door." The facilitator of the meeting should help guide vague answers to further clarity.

**Sometimes there are "smaller" threats that should be addressed but are not voted on - usually these are things that can be mitigated by a single member of the team through changes in the project plan, by gathering information, or through communication. The facilitator or Owner of the project may assign those to members of the team to handle or work into the project plan to work on outside of the pre-mortem meeting.

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