

# HOW TO TIE STRATEGIES TO ACTION:

## BUILDING THE RHYTHM OF ORGANIZATIONAL EXECUTION



PREDICTABLE SUCCESS

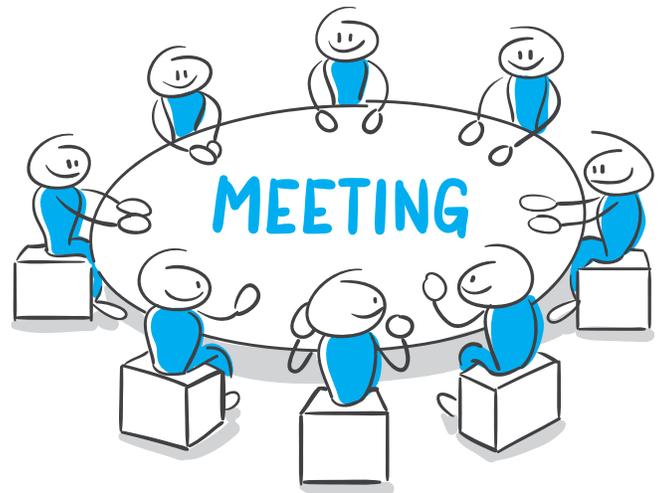
## OVERVIEW

Each person in your organization generates anywhere from 20 - 50 individual actions per day. When you multiply that by the size of your workforce, you can almost see the enormous cloud of activity that's taking place.

Knowing these actions are producing results for your organization is one thing, but knowing whether these are the *right* results is something else entirely.

How can you, as a leader, be sure this action cloud is moving your organization forward, toward fulfilling its goals each and every day?

The answer is to build a rhythm of strategic execution that reverberates through every level of your business. To do this, you must first understand **the horizons of focus** that drive execution, and then introduce **three key meetings** to help you move seamlessly between these horizons.



# 1

## THE HORIZONS OF FOCUS

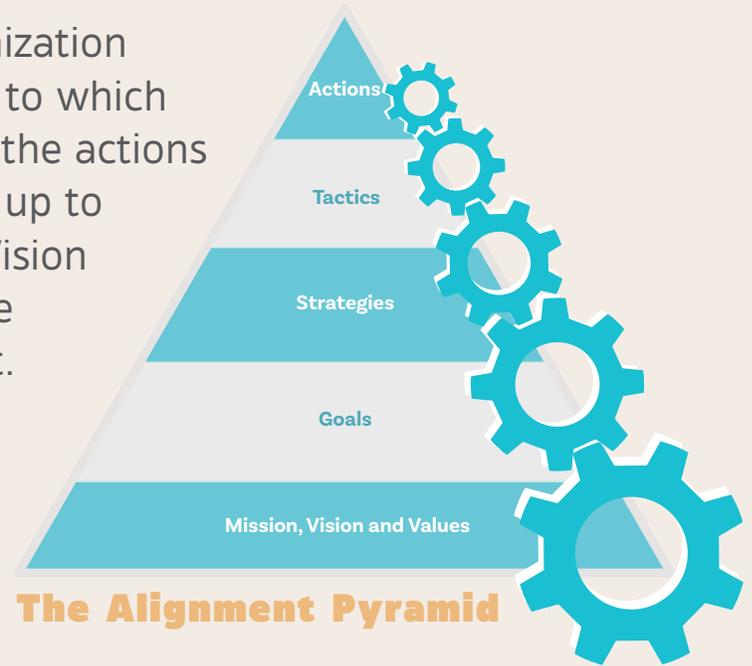
### IT'S ALL CONNECTED

A fundamental attribute of an organization in **Predictable Success** is the degree to which employees at every level know how the actions they take on a day-to-day basis add up to achieving the overarching Mission, Vision and Values (or M,V,V for short) of the organization. We call that Alignment.

In order to achieve tight alignment between Actions and M,V,V an organization works through a range of horizons. On top of our M,V,V we build a series of goals.

Then we develop strategies to achieve those goals. Next we devise a series of tactics to execute those strategies. And finally come the actions.

***As a leader, you need to be able to move through the horizons and connect them seamlessly like cogs in a well-oiled machine.***



# 1

## THE HORIZONS OF FOCUS, CONT.

### WHERE THINGS BREAK DOWN

Now that we've seen what optimal alignment looks like, let's examine where it typically derails and how to pinpoint it within your organization.

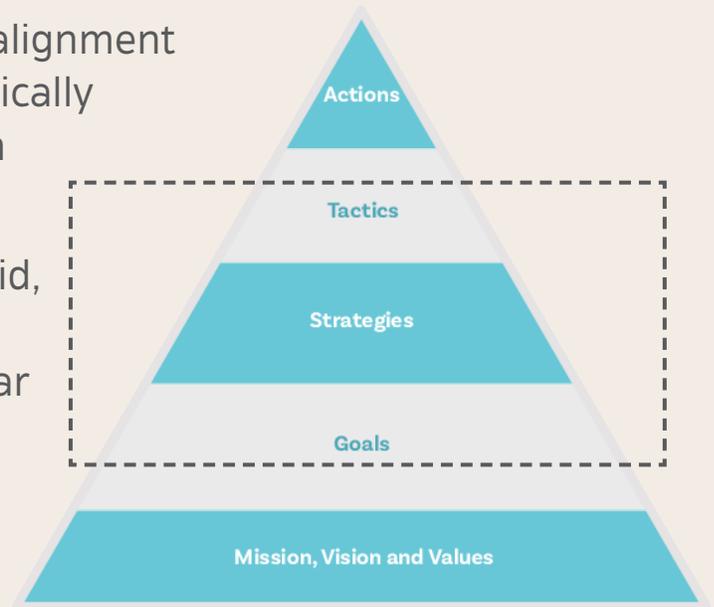
As you look at the Alignment Pyramid, imagine it as though it were a stack of weights. Now ask yourself, how far down can we put the pin in and still lift as an organization?

For most organizations in Whitewater or Treadmill, there's a separation. Our M,V,V is usually closely linked to our medium-term goals. And at the top end, our Actions and Tactics are usually coupled tightly together.

Where it starts to break down is typically between Tactics and Goals. That murky place between long-term planning and short-term execution.

What this means in effect is that we have people kicking up a dust cloud of actions every day, moving activities and projects forward. And at a senior level, we're defining where we want to go and what we want to achieve in the medium-term.

***What we're missing is a holistic picture of our projects and how, together, they add up to more than the sum of the parts.***



**The Alignment Pyramid**

# 2

## THE THREE KEY MEETINGS

Now that we've identified where the gap is, it's time to bridge it. This will give the organization the agility to execute in the short term whilst seeing potential issues in the medium term.

### THE WAY TO ACHIEVE THIS TO INSTITUTE THREE KEY MEETINGS TO MANAGE YOUR EXECUTION PROCESS:



#### THE ANNUAL STRATEGIC PLANNING MEETING

*This session takes key analyses of the past year, the current business environment and the organization's medium-term goals, and distills them down into imperatives for the next 12 months.*



#### A MONTHLY TACTICAL REVIEW MEETING

*This session is operational-focused and is used to assess progress toward monthly and quarterly goals, enabling teams to address obstacles as needed in order to achieve results.*



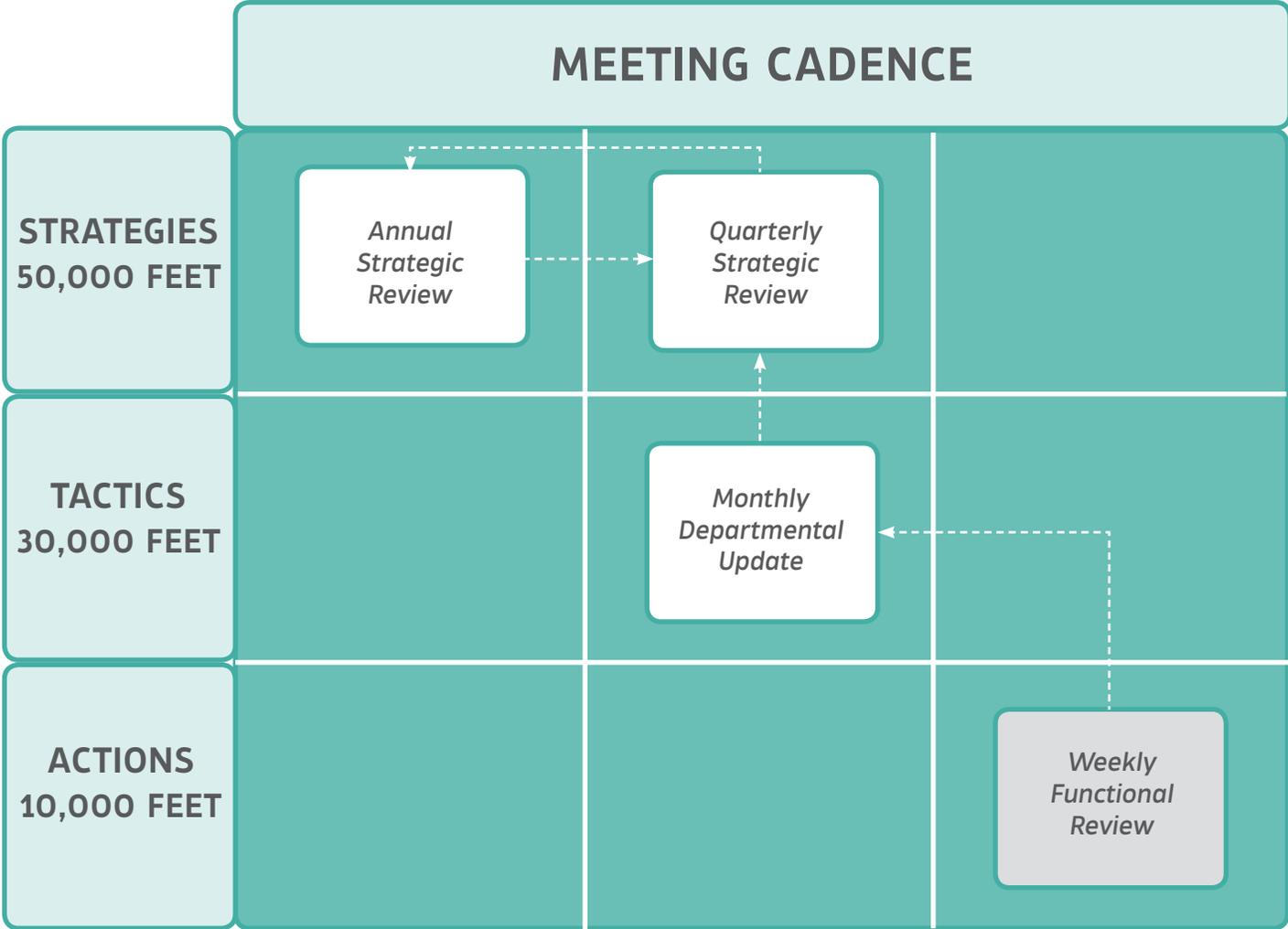
#### A QUARTERLY STRATEGIC PLAN REVIEW

*This session links the big moving parts of the annual strategic plan with the month-to-month tactical aspects, allowing you to adjust your strategic plan proactively based upon input from both your team and the marketplace.*

# 2

## THE THREE KEY MEETINGS, CONT.

Each of these meetings is linked to one of the Horizons of Focus. They have their own process and set of outcomes, and should be scheduled at very specific times.





# ANNUAL - STRATEGIC PLANNING



## PURPOSE:

*Your annual strategic planning session serves as the link between your 3 - 5 year goals and what you're planning to achieve during the next year.*

The goal of this session should be to decide on:

- Key strategic imperatives for the year
- Annual goals for those imperatives
- An overarching set of tactics for the year
- A detailed set of tactics for Q1
- Who owns the imperative



## PRE-WORK:

*Have each functional head provide the following information:*

- Progress to last year's plan
- A rough cut of the goals for the year
- Thoughts on potential strategic imperatives for the year



## PEOPLE:

- Your first Leadership Torus (Tier) - *Your Senior Leadership Team (SLT)*
- Your second Leadership Torus (if you have one) - *Usually Directors*



## PROCESS:

*You should hold your strategic retreat over 1 - 2 days, typically off-site and in the last quarter of the year.*

Appoint one person as the facilitator for the day. This person should stay focused on managing the process rather than weighing in with their personal opinion on the discussions. Ideally this would be an objective third party from outside the organization (*The facilitator should follow the meeting framework provided on the next page.*)



## OUTPUTS:

*After the session, have each imperative owner write up their imperative using the headings above.*

Have one person on the team pull them together and voila, you have your annual strategic plan.

Distribute the combined plan to the senior leadership team, ask for feedback and then finalize the plan, readying it for communication company-wide.

The annual plan (and vision) should be communicated regularly to your organization. It's only once you've started to get physically nauseated from repeating it that your people are just starting to get it.

*A note on communication: It's everyone in the Senior Leadership Team's job to assume responsibility for communication of the Strategic Plan.*



# MEETING FRAMEWORK

*There are three moving parts of the session:*

- 1. Postmortem on previous year.*
- 2. Analysis on the current business environment.*
- 3. Planning for the upcoming year.*

Your main goal throughout each of the sections is to devise a series of potential strategic imperatives for the year.

Keep two flip charts up and when something bubbles out of the conversation which seems like it would make a good candidate for an imperative, put it up on the first flip chart.

The second flip chart? Use it as a parking lot for tactical issues that arise. (Which they will, they always will.) At the end of the day, make sure to agree on a specific next action for each of the parking lot items, along with an owner.

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## 1. POSTMORTEM ON PREVIOUS YEAR

The purpose of this section is to have a non-emotive, **ruthlessly constructive** evaluation on how you performed against your goals last year as an organization. The key is to stay objective and view data as data. Remember you're reviewing your ability as an organization to execute, not individual performance.

**A. Each functional lead presents progress against last year's plan.**

**B. Discussion on what went well and what we would do differently.**

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## 2. ANALYSIS ON CURRENT BUSINESS ENVIRONMENT

The goal of this section is to reduce your organizational **DKDK**, e.g., what you "don't know you don't know". These are the things that have the potential to blindside you.

By conducting an analysis of the current business climate, you should be able to see trends in the industry to capitalize on or firewall against. It takes you out of the bubble of your business and broadens your horizon.

**Use your tool of choice.**

Depending on your industry, geography and size you may want to conduct one or more of the following:

**SWOT Analysis**

**PESTLE Analysis**

**The Predictable Success strategic planning process**

Either conduct these activities during the session or, if you have one that was already created, bring it to the group for a wider discussion.



## MEETING FRAMEWORK, CONT.

The three questions you should be asking about the analysis are:

**A. What should we start doing in this coming year to take us closer to achieving our medium-term goals.**

**B. What should we continue doing in this coming year to take us closer to achieving our medium-term goals.**

**C. What should we stop doing in this coming year to take us closer to achieving our medium-term goals.**

The answers to these should go up as candidates for strategic imperatives.

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### 3. PLANNING FOR THE UPCOMING YEAR.

A. This section is simple. Take a look at all the candidates for strategic imperatives you've noted throughout the day and have at it! You should walk away with between **five and nine** strategic imperatives. Any less and you're probably not focused on enough things to have a substantial impact. More than nine and you'll likely be biting off more than you can chew.

B. Next break into groups. Assign one imperative to each group and task them to return with:

- Annual goals for those imperatives (broken down into quarters)
- An overarching set of strategies for the year
- A detailed set of tactics for Q1
- Who owns the imperative

Then discuss as a wider team and stack hands.



# MONTHLY TACTICAL REVIEW



## PURPOSE:

*The goal of the monthly tactical review is to assess if you are on track for meeting your Quarterly Goals. It should be operational-focused and assess progress not just on accomplishments in the current month, but also toward overarching Quarterly goals.*

The two main questions to ask are:

- 1. Are we on track to hit our Quarterly goals?*
- 2. If not, what needs to happen? Re-prioritization, additional resources, additional spend?*

### **Note on Goals:**

There are a number of ways to set goals. Our recommendation and what we use internally at Predictable Success is the concept of OKRs (Objectives and Key Results).

Each person should have between 3 - 6 main objectives for a Quarter, and each of those objectives should have a 3 - 5 key results. You want to see progress toward key results in any given month in order to achieve the overarching objectives.



## PRE-WORK:

*Each person should update their goals (ideally you'd have all the goals in one place, a shared spreadsheet or internal wiki)*



## PEOPLE:

*All imperative owners. (Ideally those imperative owners will conduct a monthly review with their team prior to this meeting and outputs from that roll up into this meeting.)*



## PROCESS:

*Each imperative owner discusses:*

- 1. Progress toward quarterly goals*
- 2. Likelihood of achieving quarterly goals*
- 3. Biggest obstacle ahead of them*
- 4. What they need from the rest of the team*
- 5. Questions from the wider team*
- 6. Discussion on need for re-prioritization, additional resources or additional spend.*



## OUTPUTS:

*The following should be recorded and distributed after the meeting.*

- 1. Any decisions of re-prioritization of goals.*
- 2. Any new next actions that arose during the meeting.*



# QUARTERLY STRATEGIC PLAN REVIEW



## PURPOSE:

*The Quarterly Strategic Plan review is intended to link the big moving parts of the annual strategic plan with the month-to-month tactical aspects.*

*It allows you to adjust your strategic plan swiftly and proactively based on input from your team and data from the marketplace.*



## PRE-WORK:

*If you've been conducting your monthly reviews properly you shouldn't have to do too much additional work to get ready for the quarterly review.*

*Have each initiative owner:*

- 1. Update status for past quarter*
- 2. Draft goals for the upcoming quarter*



## PEOPLE:

*Your first Leadership Torus - Your Senior Leadership Team (SLT)*

*Your second Leadership Torus (If you have one) - Usually Directors*



## PROCESS:

*Have each initiative owner:*

- 1. Go through status from last quarter*
- 2. Share goals for upcoming quarter*
- 3. Share tactics for upcoming quarter*
- 4. Share perceived obstacles for the quarter*

*The group should then discuss the following:*

- 1. Are our strategic imperatives still valid?*
- 2. Should we postpone any initiatives or trade in any new initiatives?*
- 3. Do we need to re-prioritize any initiatives, bring in additional resources or additional spend?*



## OUTPUTS:

*From this session the SLT should communicate out the update from last Quarter along with focus & goals for the upcoming quarter to the whole company.*

## CONCLUSION:

Let's think about the action cloud that's being generated every day within your business. Just as before, each person is contributing to your organization's progress. But now, their actions are focused, with an eye toward the overarching goals they're helping the business to achieve. Everyone is moving, together, leading your organization to scalable, sustainable success.



The Acceleration Program can help you make these powerful strategies work for your organization.

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