Chapter Nine

How Will You Know When You Get There?

Your team is now poised to take the mission and vision to the next level—an action plan to make it become reality. You know what is working against you; so now you need to decide where you're going to focus your attention and resources, and what specifically must be done. I will share my recommendations on how to broadly communicate your plan, follow-up on the progress being made, celebrate your successes, and course correct. This is what will ensure that you execute with excellence.

You'll recall that the last chapter ended with your identification of the key forces working for and against your vision for success. The next step I usually take during my sessions is to ask the participants in the room to look at all of these key forces, and identify the critical few strategic priority areas upon which we need to focus. I like to call these the big buckets of work that need to be done; and as unsophisticated and nontechnical as that may sound, people actually get it. It might include areas like infrastructure, operations, marketing, products and services, finances, facilities, and more. At this time, these are only meant to be labels for the buckets; they don't represent what we will actually *do*, or how we will measure our success. If it helps, the team can also think of these areas as the umbrella under which all of the various

initiatives and projects should fit. But these strategic priority matters still need to be limited to the three to five highest priority ones. Focus is key here, because strategic planning is not truly *strategic* unless you are deciding what *not* to do along with what *to* do.

The process I use is very simple. First, make sure that everyone understands what is meant by a strategic priority area. Give each person three sticky notes, and ask them to look at the array of positive and negative forces that you've just assembled. Then legibly write one strategic priority area per sticky note. Even though you might eventually end up with five, I think that giving people only three choices forces people to pick their truly highest-priority items.

I am often asked if the group should focus solely on the forces working against us. Instead, I encourage you to have your colleagues really attempt to look at the totality of the picture when they are developing these priority areas. In this way the team does not myopically look only at the negative—the normal human instinct of fixing a problem—but also considers how to use those forces in our favor to keep driving toward success, and maybe even to overcome those negative forces. Another key point in this regard: I often find that teams put the same issue on both sides of that T chart. It can be seen as a force for good or evil, as I like to say—it all depends on which aspects of it you look at. You would likely lose sight of that if you only look at one side of the equation.

When everyone has identified their top three priorities, which should take about three to five minutes, there are several different approaches that you can use to categorize similar ones, depending upon the size of the group. You might ask a team of six to eight people, for example, to bring their sticky notes down front and place them on two flip chart stands. Then everyone can work collaboratively to group like ideas together, until you have some fairly clear buckets (and perhaps a few outliers). Reach a pretty quick consensus on what you want to label each bucket. This is an especially good approach if people have been sitting for a while, and they really need to get up and be energized again by physically moving around the room.

You might want to break a larger-size crowd into smaller groups of four to five people, and then have them conduct the

classification of sticky notes in these subgroups. You would then need to debrief as a large group to discover the similar buckets across the groups. One other approach would be for the leader (or another participant) to ask for one sticky note from an individual, read it aloud, and ask for others that are similar to this one, thus building your priority buckets as you go. However, I must warn you that based on previous experience, this can be a somewhat arduous task, especially with larger groups.

Once you have reached a groupwide decision on the three to five top strategic priority areas on which you need to focus your attention and resources, I recommend that you break into clusters of two to three people and assign one group to each strategic priority area to work on fleshing out the details. Either you can let the clusters select the area upon which they want to focus, or you can assign them based on creating cross-functional teams. The pro of letting them pick is that they get to follow their passion—and perhaps expertise as well. These are the ideal people to potentially champion the work to be done for this area after the session. The pro of assigning them is that you can insert some ignorance into each group; in other words, sometimes the best questions and suggestions come from those who are ignorant of what everyone else knows is absolutely true. They prompt us to question our mental models and paradigms of what is and is not possible. Yet another alternative might be to execute this step in the large-group setting, facilitated by the leader or another member of the team. A word of caution about this approach—it can really begin to drag if the facilitator doesn't make a conscious effort to keep it moving.

You now need to decide what success looks like for each strategic priority area as it relates to supporting the vision and addressing the forces working for and against your success. You then must develop metrics for measuring that success. You must decide the end-point time frame for this planning effort (which should be the same for all priority areas). I often recommend that the time frame coincide with your fiscal year, especially if you are looking at a time frame of about 12 to 18 months out. I feel strongly that it is very powerful for people to have a fixed point in their mind toward which they can plan.

Let's be clear: we are not saying that the strategic priority will be completely *accomplished* by this point in time. We are only trying to determine what *could* potentially be accomplished by that time.

We've now come to a point where you have subgroups working on each priority area. Each knows the time frame against which they are planning, and they have reached a consensus on what success will generally look like at this point. Now you need to establish some metrics to use so that you will actually know it when you achieve success.

I believe that many members of corporate America have gotten too hung up on using quantitative measures exclusively without considering the benefits of qualitative measures. I recommend that you remain open to using both types. I have seen quite a few teams exclude a given priority area simply because they couldn't put a number to the measure. Hitting a target date also is another way to satisfy this need to measure success. Take a look at what can be measured *now*. Will this adequately meet your needs? If not, is there another way to measure what you are trying to assess? Is the investment of time and resources to create/revise a process or tool for gauging and gathering worth the added information that you will get?

I recommend including both leading (that which gives you insight in advance of something actually occurring) and lagging (that which you track after the fact) indicators in your set of measurements. Why? Did you know that right now across the earth there are scores of people—scientists and volunteers—who are systematically measuring changes in the firefly population, and they have some concerns. So concerned in fact, that more than 100 entomologists and biologists recently gathered in Thailand for an international symposium on the "Diversity and Conservation of Fireflies." Similar to a canary in the coal mine, they believe these significant declines in the firefly population could be indicative of destructive changes in the surrounding environment—changes that might not only be harmful to fireflies, but to humans as well. What should you be measuring now that will help you to foretell and hopefully forestall something that could deter your team from successfully achieving your plan . . . and ultimately your vision for success?

I often recommend at this point that a team determine what critical items they want to track on a regular basis. This can then very effectively be turned into a team dashboard to review frequently and consistently. Consider an actual car dashboard. What is your equivalent to the speedometer; could it perhaps equate to the achievement hit rate for major project milestones? What about the fuel gauge? Is this the voluntary turnover rate, or maybe the measured engagement level of the employees? Could the odometer or the mileage trip counter be a longer-term goal or objective for the team? You get the idea; but I really think putting it in terms that people on the team can visualize and relate to makes it much more impactful.

The next step is to create—while still in the strategic priority subteams—very concrete action plans that include key milestones, timelines, and accountabilities. Ask your team: knowing what success looks like (i.e., what needs to be accomplished by the end of the planning period) and given where we are now, what must we accomplish along the way? Then have them write down each of these key milestones on a sticky note, along with a due date and the person or department accountable. Use a different colored pad for each priority area.

These should not be the specific interim steps, tasks, and activities; but should instead capture the desired end result. For example, if you were going to conduct an employee survey, you would not write down "Send the survey out to employees" unless, for some reason, that was going to be a significant undertaking in its own right. You might simply write, "Conduct the employee survey," which presumably includes all of the substeps—like selecting a vendor or creating your own survey; deciding who will participate; determining whether it will be online or paper and pencil; and so forth. The next end result might be, "Agreement reached on recommendations from survey results"; which again presumes the substeps of gathering the data, analyzing it, developing recommendations, and holding meetings with key stakeholders to discuss results and finalize recommendations for implementation. All of these substeps and their timing will be fleshed out after this session by the people accountable for executing on the key milestones.

Here is the process I use for creating and then debriefing the timeline:

1. Tape up several blank flip chart sheets in a row across the front of the room.
2. Draw a horizontal timeline across the middle of the page (I usually show breaks on this timeline for each quarter).
3. Along the left side place a colored sticky note that corresponds to the color for each priority area, and write the name of that area on it.
4. Invite the subgroups to come up and place their sticky notes along the timeline (in a horizontal line adjacent to the colored sticky note with their area name on it). You will end up with different streams of sticky notes, one for each priority area. It is very visually impactful to see these multicolored notes on the timeline.
5. Finally, take each area one at a time and ask someone from the group to walk us through the corresponding sticky notes. Do keep track of the time and allow each area about 10 minutes max for their debriefing, or it will really begin to drag.
6. While that person is walking the group through their area's timeline, ask everyone else to actively listen for interdependencies, overlaps, resources needed, and support offered. Fill out new sticky notes as needed to capture new milestones and put them on the timeline.

In terms of next steps after this debriefing, the team will often decide on priority area champions or two-person subteams to lead the charge on tracking the progress of their selected priority area. This can be a wonderfully bonding experience for two people to work together on a subteam to achieve this goal. The other added advantage—which appeals particularly to the team leader—is that with this approach, it is no longer the leader's plan . . . it is the *team's* plan; and they have increased accountability to execute it with excellence.

While everyone is still in the session, you need to give significant thought to what and how you will communicate

this strategic vision and plan to the various stakeholders involved—some of whom might include the next level up boss, direct reports of those in the room, and internal and external clients/customers. In addition to capturing the key output of the day—and especially the timeline—into a word document, I also suggest that as a group you capture a few vital messages that convey the essence of the session's output. What were some of the more critical decisions we made? What has changed about how we will focus our attention, efforts, and resources? How will people's roles transform based on what we decided?

It is said that however much your team or organization is communicating now, when you're in a state of transition (which you should be, if you have truly done a good job of making strategic choices about what you will and won't do) you can multiply this by 100; and you are *still* not communicating enough. Simply sending out the book *Who Moved My Cheese?* and informing people that change happens and they need to get over it is *not* the way to get everyone comfortable and on board with the changes needed to make the new vision for success a reality.

What *should* you be communicating; and to whom, how, and when? To answer these questions, I create a communication matrix that captures all of this information in one easy document:

- Column One: List all of the various *audiences* with whom your team must communicate.
- Column Two: List each of the key *messages* and the *purpose* of the communication for each audience (and there may be multiple purposes for a single audience)—to inform, to engage, to implement some aspect of the plan, to influence, to solicit funding or other resources, to gain their input, and so on.
- Column Three: Here, you want to list the top *vehicles* of communication for each audience—those that are most impactful for each audience and message—like face-to-face meetings, town hall meetings, e-mail, newsletters, phone calls, and so on. Be sure to include both one-way and two-way communication methods, and see if you

can locate any internal surveys that might have been conducted that show how people in your organization value these different methods. This information can be very helpful in the planning phase.

- Column Four: Decide on the *timing* for each communication vehicle for each audience. Remember: you can't just say it once in one format and think that everyone will get the message the first time out. If you truly must get everyone on the same page, then you will likely need to communicate the same message at least three different times in three different formats over an extended period of time for people to take seriously any shift in direction or focus.
- Column Five: Be sure to capture here *the person or people accountable* for each of these messages, and who needs to approve, provide input, or respond to the drafts before sending them out.

If your strategic plan was created by a leadership team but needs to be executed by a much larger team of people who were not present during its original creation, then you must develop an approach to share and gain the executors' input on the strategic mission, vision, priorities, and dashboard. In fact, you might not even want to determine the milestones and create the timeline in the small leadership session. Instead, bring the team together to gain buy-in and/or create the above strategic plan elements, reality test them, identify key challenges, and engage *everyone* in solving them. This is true, two-way communication; and it is vital to helping everyone connect the dots between what they do on a daily basis and how that activity contributes to the overall success of the organization—in other words, that what they do really matters. In his book *The Three Signs of a Miserable Job*, Patrick Lencioni makes a very strong case (in his always-compelling fable style) that employees who don't know how their work impacts the lives of others will experience irrelevance, and will not be fulfilled in their jobs. Remember Jill from Chapter 7, and the importance of hearing from her co-workers how she positively impacted their jobs? Similarly, everyone coming out of this session should have a clear line of sight into

at least one (and hopefully more than one) metric to which they can directly contribute. This information will then allow them to take it all the way down to determining their individual objectives and setting budgets.

The final step in the process is to figure out how the team will follow up, celebrate successes, and course correct. There will need to be regular and consistent progress tracking on the team dashboard and on the milestones in meetings, of course. This needs to be an area of focus—not in a report out fashion; but in genuine, problem-solving mode (and I will show you how to do so in upcoming chapters). In addition, I strongly recommend that you have at least one half- to full-day session (preferably off-site, or at least in a different meeting room) after three months, and again after six months. As I am sure you well know, what gets measured gets done. The purpose of these sessions is for the leader to keep everyone, including themselves, focused on the right things. Making it clear that these sessions are on the calendar and will not be canceled ensures that everyone understands the high priority of executing the plan.

The team should accomplish the following critical undertakings during these sessions:

- *Celebrate success.* One of the chief complaints I hear from team members is that they don't stop to truly rejoice in what they have accomplished together; and often, the team leader is the biggest culprit. Engage the team in figuring out how to really reward and recognize what they have done (and it doesn't always have to involve money!). I have seen teams celebrate with company-bought pizza in the conference room for a Friday lunch; or perhaps everyone takes off for a team outing at a bowling alley or for putt-putt golf. Remember to keep the focus on a team celebration—not everyone simply getting off early for the day and going their separate ways. That may be individually satisfying, but it does nothing for reinforcing the excitement and reward of a true team accomplishment.
- *Identify where the reality is falling short of plan, and why.* If you don't know what got you here, you won't be

able to course correct. Were the assumptions too conservative or too extreme? Was the data faulty; or was the wrong data used? Have there been unforeseen circumstances that negatively impacted the plan? Has it been a case of bad execution? If so, what was the cause? This is not a time to assign blame, but rather to truly learn from what has occurred and agree on a course of action to make sure that the same mistakes aren't repeated again.

- *Replan as required.* You must keep the plan real, or people lose the motivation to carry it out. Neglecting to openly acknowledge the changes that need to be made—and not encouraging the team to help to face this challenge together head on—is a slippery slope down to a very disengaged team that will not be so quick to participate the next time you want to hold another off-site!

Imagine you are on the shoreline of the beach, watching the waves come in. You see a big one approaching. It crashes to shore. And then . . . nothing. Calm waters behind it.

I recently shared this analogy with an operations team at a consumer products company during a strategic planning session, and used it to explain to them that as soon as you are getting close to the end of your vision horizon, you must begin to plan for the next one.

There will always be a new wave to replace the one that just hit the beach. You need to be able to see in the distant future—not necessarily to each and every wave, because you do need to have time to catch your breath or it will overwhelm you like a rip tide. But if there is too much time between one big wave and the next, you can grow complacent, get bored, and then be taken by surprise and knocked over when the next one comes. The time to come together, celebrate your success, and begin the process all over again is just before that next big wave hits; or you will find yourself surrounded by the dead calm that settles over the ocean after that last big wave washes everything away.