

Strategy Huddle™ with MyStrategicPlan:

Keeping Your Team Focused, Engaged, and
Improving

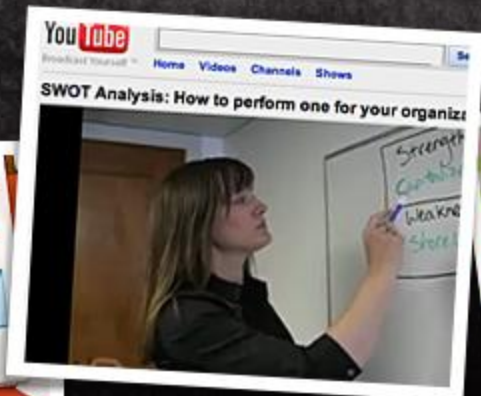
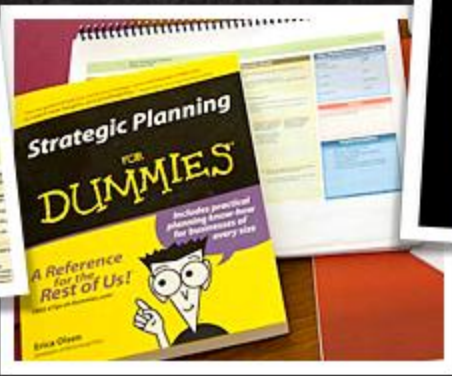
Welcome!

Powered by



- Purpose** Answer real-world questions, handle high-level strategy issues, and share best practices on strategy, execution, planning
- Duration** 45-60 minutes
- Your Role**
- Ask questions: Questions can be submitted via the Chat Box on right at any time. **
 - Offer suggestions: Share your experience via the Chat Box during the topic at hand
- Details** Session is being recorded and a follow-up email this week will include a link to this huddle as well as the supporting slides.

- ⑥ In the past three years we have...
- ⑥ Managed 100+ strategic planning processes
- ⑥ Deployed 800+ strategic management systems (MyStrategicPlan, MyNonprofitPlan, MyChurchPlan)
- ⑥ Built consensus and commitment with 3,000+ executives, managers, boards
- ⑥ Empowered 1 million+ strategist & soon-to-be strategists



I. Stat of the Month

II. Topic: Keeping Your Team Focused, Engaged, and Improving - make strategic management as easy as possible for your team!

- FOCUS in all phases of your planning process (Tommy Smith)
- Keeping everyone engaged (Erica Olsen)
- Drive continuous improvement to move the needle (Elsa Ozuna-Richards)

III. Tap into the Wisdom of the Crowd: Your Questions (Time Permitting)

2.5% amount of use students made
of a lecture hall

Why you always sit in the same place in meetings

People exhibit territorial behavior when they take seats in public places, limiting themselves to small areas so they don't have to "renegotiate" seating arrangements

Source Info Territorial Behavior in Public Settings

Tommy Smith

Topic: Getting Focused

Contact Info: tommy@m3planning.com

VISITING STRATEGY LEADER

FOCUS as a Mission Statement

F - Facilitate

O - Organization

C - Clarification

U - Unification

S - Strategic Management

FOCUS as a Value Statement

F - Faithfulness, dependable, integrity

O - Organization, structured

C - Communication, clear, concise

U - Understanding, patient, listen well

S - Simplicity, relative, motivational

FOCUS as a Unique or Competitive Advantage

- F** - Framework (planning sessions, MSP)
- O** - Organizations (companies, events, projects)
- C** - Clarify, communicate
- U** - Understand, unify
- S** - Strategic management process

FOCUS as Vision Statement

F - Follow-up

O - Open, organized communication

C - Clear mission, values, vision

U - Unified culture in pursuit of the vision

S - Scorecard measuring performance

50 Focused organizations in
5 years practicing FOCUS

Results of FOCUS

- F** - Fearless and faithful in the pursuit
- O** - Open and opportunistic in the pursuit
- C** - Concise and clear in the pursuit
- U** - Understand and unified in the pursuit
- S** - Strategic/Score progress of the pursuit

Summary & Takeaways

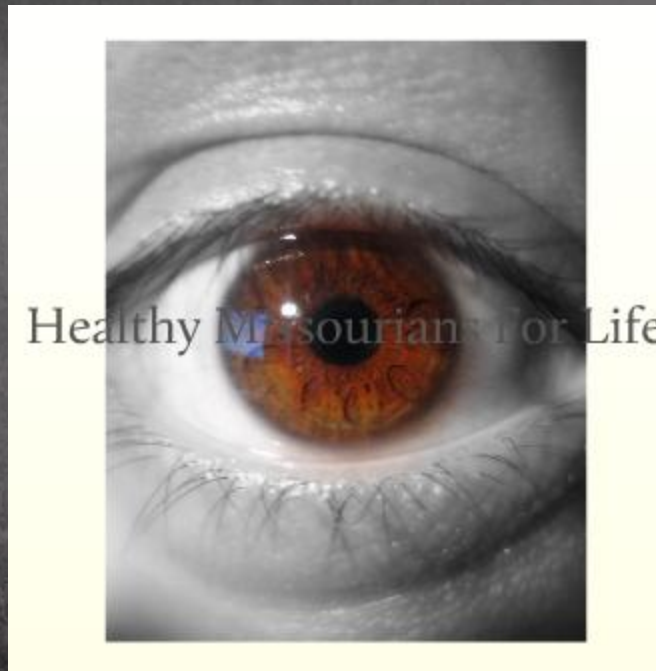
- ✓ **F** - Frame it
- ✓ **O** - Organize the effort
- ✓ **C** - Communicate (consistently, clearly, concisely)
- ✓ **U** - Unify the team
- ✓ **S** - Score, analyze, update, celebrate progress

Engaging your organization month after month

**KEEPING YOUR TEAM FOCUSED,
ENGAGED, AND IMPROVING**

How we keep people engaged

- ✓ Compelling vision
- ✓ Relevance to everyone
- ✓ Hold staff “able”
- ✓ Measure that matter
- ✓ Drive decisions



- 1. Hope the vision becomes a reality**
- 2. Ensure that it does**

Action Statement,
Right Person,
Right Rock Size

Cascading Objectives

Number	Level	Who is responsible	Time Frame
1	Long-Term Strategic Goal	Not assigned	3-5 years
1.1	Dept. Objective	Organization-wide – not assigned	18-24 months
1.1.1	Division Objective	Assigned to Division	12-18 months
1.1.1.1	Team Member Objective	Assigned to Team Member.	6-12 months
1.1.1.1.1	Team Member Action	Assigned to Team Member	30, 60, 90 days

I see and can accomplish what is on my list.

Priority	Division Strategies & Team Member Strategies	Who	Year End Target	% Complete/ YTD	Status/ Variance	Start Date/ End Date
2.2 (New- SIU) Protect and preserve quality of life for Missouri's elder/ eligible adults while holding offenders accountable for violations of abuse, neglect and/ or exploitation.						
	2.2.1 Increase number investigations completed involving abuse, neglect and exploitation of elder/ eligible Missouri adults	DSDS		0 %		04/18/11 04/18/12
	2.2.1.1 Reduce time used to complete investigations	Tim Huesgen	80%	0%	-80%	04/18/11 04/18/12
	2.2.1.2 Interview and collect information from requestor within 5 working days of case assignment.	Tim Huesgen	100%	0%	-100%	04/18/11 04/18/12
	2.2.1.3 Interview/ contact complainant/ victim within 15 days of case assignment.	Tim Huesgen	100%	0%	-100%	04/18/11 04/18/12
	2.2.1.4 Make at least 2 contacts each month on all cases assigned.	Tim Huesgen	2		-2	04/18/11 04/18/12
	2.2.1.5 Make at least 4 out of office contacts each month.	Tim Huesgen	16		-16	04/18/11 04/18/12
	2.2.1.6 Conduct monthly case reviews to discuss strategies for successful completion.	Tim Huesgen	100%	0%	-100%	04/18/11 04/18/12
	2.2.2 Increase awareness in the law enforcement and prosecutorial arenas in regard to the dynamics associated with elder/ eligible abuse and neglect.	DSDS		0 %		04/18/11 04/18/12
	2.2.2.1 Increase investigative support and training assistance to local law enforcement and prosecutors.	Tim Huesgen		0 %		04/18/11 04/18/12
	2.2.2.1.1 Contact Missouri Office of Prosecutor Services (MOPS) and law enforcement agencies to offer elder/ eligible adult abuse training courses.	Tim Huesgen	6	0 %		04/18/11 04/18/12
	2.2.3 Garner support from law enforcement, prosecutors, judges, medical professionals, financial institutions and APS workers to work collaboratively.	DSDS		0 %		04/18/11 04/18/12
	2.2.3.1 Increase awareness in the benefits of a multidisciplinary approach to investigating/ providing protective services.	Tim Huesgen		0 %		04/18/11 04/18/12
	2.2.3.1.1 Present training modules that encourage and explain the benefits of the multidisciplinary approach to elder/ eligible adult abuse investigations.	Tim Huesgen	6	0 %		04/18/11 04/18/12

Inspiring,
Clear & No
Ambiguity

Measures that matter

Customers

Increase participation in the Stanford Chronic Disease Self-Mgmt. model in the ten AAAs from XX to 800 by 2013

of patients with high blood pressure



Post a chronic disease web portal to ... improve ease of locating chronic disease data

customers helped by simple survey

Internal

Use evidence-based strategies to target at-risk populations to increase early detection of chronic diseases

% increase in cases where diseases are detected early compared to last year

People

Deliver training or other methods to disseminate information and provide guidance to program personnel

% of supervisors with documented improvement on PEs

Financial

Integrate multiple streams of chronic disease funding in order to maximize resources, enhance efficiency, and reduce duplication of efforts

of case workers/clients without a reduction in care

Questions to ask to move from outputs to outcomes

- What is the result or outcome of achieving the objective?
- Why are we working on this objective?
- How will we know we have accomplished the objective?
- What do we expect to see different as a result of accomplishing this activity/project?
- Does it tell our story?

	WEEKLY OPS MEETINGS	DIVISION STRATEGY MEETINGS	DEPARTMENT STRATEGY MEETINGS	QUARTERLY ALL HANDS
DEPARTMENT DIRECTOR			First Monday of Every Month 8:30-10:30am MDP Exec Sum w/ Status and www.m3planning.com/bsa	July 7th, Oct. 6th, Jan. 5th 9-11:30am No reports required
DIVISION MANAGERS	Every Monday MSP Exec Sum w/Status or MDP Action Sheet sent to Gary first Monday	First Monday of Every Month Full Plan with Progress	First Monday of Every Month 8:30-10:30am MDP Full Plan w/ Status and www.m3planning.com/bsa	July 7th, Oct. 6th, Jan. 5th 9-11:30am No reports required
TEAM LEADS	Every Monday Weekly status on MDP Action Sheet	First Monday of Every Month MDP Action Sheet		July 7th, Oct. 6th, Jan. 5th 9-11:30am No reports required
INDIVIDUAL CONTRIBUTOR	Every Monday Weekly status on MDP Action Sheet	First Monday of Every Month MDP Action Sheet		July 7th, Oct. 6th, Jan. 5th 9-11:30am No reports required

Your Next Steps

- ✓ Individual goals and actions that are “big rocks” not sequential task lists
- ✓ Plan for the “strategic” projects/initiatives not “business as usual”
- ✓ Review your measures
- ✓ In your strategy sessions discuss:
 - 1-2 objectives that are on target and why
 - 1-2 objectives that are NOT on target and why

Drive continuous improvement to move the needle

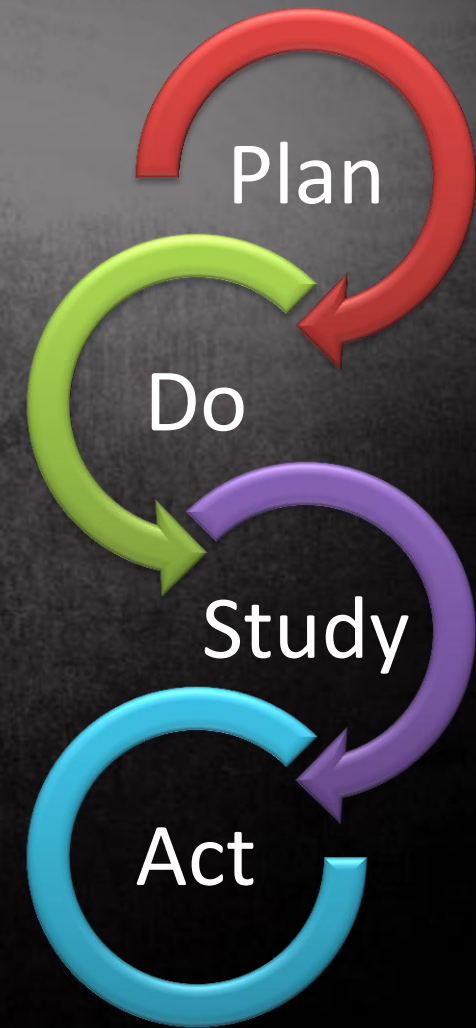
**KEEPING YOUR TEAM FOCUSED,
ENGAGED, AND IMPROVING**

CQI consists of four basic elements

1. Problem Solving
2. Interpersonal Skills
3. Team Work
4. Quality Improvement Process

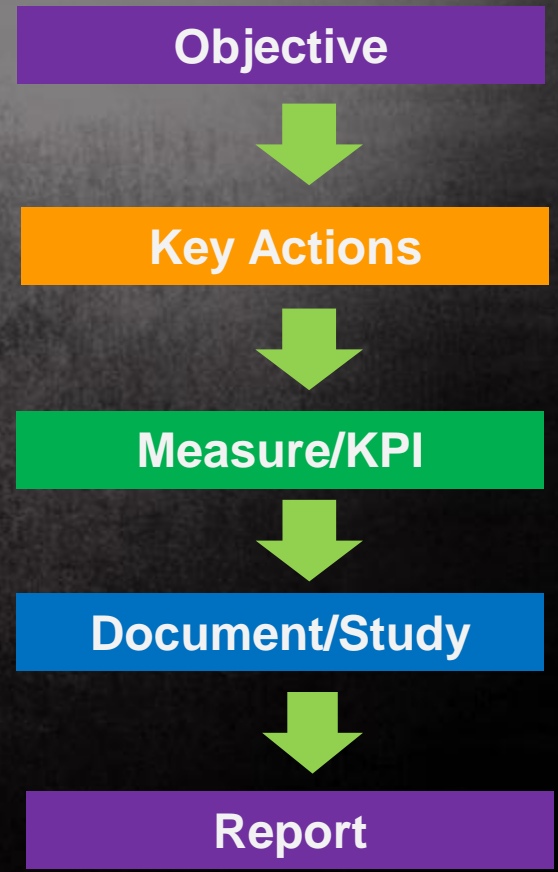
- ✓ Typically failure is not associated with individuals but of poor CQI process development
- ✓ Focus must be critical of “development” with excellent follow through

- What are we trying to accomplish?
 - Objective statement
- How will we know that change is an improvement?
 - Measure
- What changes can we make that will result in improved outcomes?



- Begin by understanding what the desired outcome will look like
- Developing clear and succinct objectives to achieve the outcome
- Which actions will help us achieve our objectives
 - Who, what when, where, how,
- Everything must be measureable
- Study progress
- Refine and adjust actions

Increase participation in the Stanford Chronic Disease Self-Mgmt. model in the ten AAAs from XX to 800 by 2013



Your Next Steps

- ✓ Pick a process or a problem.
- ✓ Refine or revisit the objective you are trying to solve.
- ✓ Identify what the favorable outcome is.
- ✓ List your action items to improve the process.
- ✓ Implement and track.
- ✓ Do it again.

Any insights you would like to share related to one of today's topics?

What are some change skill building questions you would like to discuss?

- ⑥ Next Date is June 22nd 9am PT
 - Visiting Strategy Leader: Alice Heiman
 - Topic: Sales Strategy & How it Fits into your Strategic Plan
- ⑥ Send in questions for the next Strategy Huddle to admin@mystrategicplan.com (reference the Strategy Huddle in the subject line)
- ⑥ Interested in sharing/presenting a best practice as a Strategy Leader? (send email to admin@mystrategicplan.com and reference the Strategy Huddle in the subject line)
- ⑥ Follow us on Facebook & Twitter @MyStrategicPlan
- ⑥ More great training available:
www.mystrategicplan.com/resources
- ⑥ Today's session is being recorded and a follow-up email this week will include a link to this huddle as well as the supporting slides.

Get Expertise When You Need It

One-on-one guidance for those trouble spots in your planning

mystrategicplan.com/strategic-planning-consulting

Quick Start Coach

Get started on the right foot and avoid pitfalls to improve the success of your plan.

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\$495

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[Get More Info](#)

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Ensure your plan is complete, holistic and ready to implement!

- Our team will provide you with a report and specific recommendations for your plan based on years of experience.

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Receive a full plan and strategic process to drive your whole organization.

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\$4,750

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