However beautiful the strategy, you should occasionally look at the results.

Winston Churchill, British Prime Minister
M3 BY THE NUMBERS

In the past three years we have...

- Managed 100+ strategic planning processes
- Deployed 800+ strategic management systems
- Built consensus and commitment with 3,000+ executives, managers, boards
- Empowered 1 million+ strategists & soon-to-be strategists

MYSTRATEGICPLAN OVERVIEW

Create Strategy Faster(er)  Empower the Team  Manage Execution
AGENDA

1. Establish an execution schedule with correct frequency, tools and reports to support the process
2. How to effectively review your progress and track your key performance indicators using MyStrategicPlan
3. How to run great monthly strategy review meetings
4. So You Have a Strategic Plan...Now What?
IMPLEMENTATION OVERVIEW

How will we use the plan as a management tool?

**Definition:**
Implementation is the process that turns strategies and plans into actions in order to accomplish strategic objectives and goals.

**Outcome:**
Synching checking in with your plan into the “rhythm of your business”

QUESTIONS TO ASK

- **Communication Schedule:** How and when will you rollout your plan to your staff? How frequently will you send out updates?
- **Process Leader:** Who is your strategy director?
- **Structure:** What are the dates for your strategy reviews (we recommend at least quarterly)?
- **System & Reports:** What are you expecting each staff member to come prepared with to those strategy review sessions?
TIPS

1. Narrow the focus - select high priority goals.
2. Empower the team to act on lead measures.
4. Create a cadence of accountability.

PROCESS TO EXECUTE YOUR PLAN

Establish your processes, schedule and accountabilities
QUESTIONS TO ASK

- **Communication Schedule:** How and when will you rollout your plan to your staff? How frequently will you send out updates?
- **Process Leader:** Who is your strategy director?
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CREATE A CADENCE OF ACCOUNTABILITY

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**CREATE A CADENCE OF ACCOUNTABILITY**

- Department Action Plans
- Team Member Action Plans
- Current Year Budget
- Current Year YTD Capital Expenditures
- One-Page Plan
- Strategic Plan Brochure
- Comprehensive Strategy Plan
- Executive Summary with Progress Strategy PowerPoint
- Department Action Plans
QUARTERLY STRATEGY REVIEW - OVERVIEW

Month 1
Operations Review

Month 2
Operations review

Month 3
Strategy Review

Core departmental-level leadership team.
Key staff.

Entire senior management team.
No operations review.
Discuss strategic issues (chosen in advance).

* Steps based on an article from Balanced Scorecard Collaborative (BSC) Report, December 2006

QUARTERLY STRATEGY REVIEW - DETAIL

Quarterly Actions

Annual Strategy Update
Strategy Development  Strategy Execution

Teams prepare info about 2 strategic issues and external environment review.

Issue Prep

Month One
Department Review (1-2 hrs)

Month Two
Department Review (1-2 hrs)

Month Three

Senior Management Quarterly Review (½ day)
(Decisions on strategic issues)

If necessary, update dept. plans and budgets for next quarter

Roll-out (beginning)
Or Adaptive guidance (if necessary)
MONTHLY STRATEGY REVIEW - OVERVIEW

AM

Operations Review

Overview of strategic plan.
Detailed operational analysis.

PM

Strategy Review

Discussion of strategic issues identified in advance.
Update plan if needed after meeting.

* Steps based on an article from Balanced Scorecard Collaborative (BSC) Report, December 2006

MONTHLY STRATEGY REVIEW - DETAIL

- Strategy Development
- Strategy Execution

Week One
- Team Member Online Status Update
- Dept. Operations/Strategy Review (1 hour)

Week Two
- Issue Prep

Week Three
- Senior Management Team Operations/Strategy Review (1/2 day to 1 day)

Week Four
- Plan guidance reported back to team.
### MEETING & REPORTING STRUCTURE

<table>
<thead>
<tr>
<th>Management Structure</th>
<th>Plan Structure</th>
<th>Meeting &amp; Reporting Structure</th>
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<tbody>
<tr>
<td>CEO</td>
<td>Vision</td>
<td>Executive Monthly Strategic Review (Qtrly Townhall (All))</td>
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<td>Mission</td>
<td>Weekly Tactical (Dept. Managers with their Team Leads &amp; All Staff)</td>
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<td>Managers</td>
<td>FY13 &amp; 14 Corp Goals</td>
<td>Department Monthly Strategic (Dept. Managers with their Team Leads &amp; All Staff)</td>
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<td>Teams</td>
<td>FY13 &amp; 14 Department Goals</td>
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<tr>
<td>All Staff</td>
<td>FY13 Team Goals</td>
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<td>FY13 Individual Goals</td>
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<td>Weekly To-Dos</td>
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**Distributed execution management to drive results**

**HOW TO TRACK YOUR PROGRESS USING MY STRATEGIC PLAN**
**KNOWING WHAT YOU ARE TRACKING**

**Qualitative Measures:** Managerial estimation of status, stoplight icon, % complete - milestone status, tracked as point in time.

**Quantitative Measures:** Marked as Key Performance Indicators, tracked monthly.
- Sum: $ in revenue, # of new customers
- Average: Profit margin %, number of returns, days on hand
- Highest number: Running totals
- Lowest number: Error rates, defects
- Current: # of customers

**Source:** Note the source for easy of updating

**Frequency:** Identify metrics that are tracked monthly

---

**WHO IS RESPONSIBLE FOR WHAT**

<table>
<thead>
<tr>
<th>Management Structure</th>
<th>Plan Structure</th>
<th>Accountability Structure</th>
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<tbody>
<tr>
<td>CEO</td>
<td>Vision</td>
<td>Lag Measures</td>
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<td>FY13 &amp; 14 Corp Goals</td>
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<tr>
<td>Managers</td>
<td>FY13 &amp; 14 Department Goals</td>
<td>Lead Measures</td>
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<td>Teams</td>
<td>FY13 Team Goals</td>
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<tr>
<td>All Staff</td>
<td>FY13 Individual Goals</td>
<td>Milestone Status</td>
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</tbody>
</table>
MyStrategicPlan Settings:

- Set the department and team member strategy alert dates.
- Check out last login note.
The monthly or quarterly review meeting is the heartbeat of the strategy management process.
### REPORTS TO USE

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Reports</th>
<th>Who</th>
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<tbody>
<tr>
<td>Executive Strategy Review Meeting</td>
<td>• Executive Summary with Progress</td>
<td>CEO</td>
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<tr>
<td></td>
<td>• Dept. Action Sheet</td>
<td>Department Managers</td>
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<td>• The Dash</td>
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<tr>
<td>Department/Functional Strategy Review</td>
<td>• Dept. Executive Summary with Progress</td>
<td>Department Manager</td>
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<tr>
<td>Meeting</td>
<td>• Individual Action Sheets</td>
<td>Individual Contributors</td>
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<td></td>
<td>• The Dash</td>
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<tr>
<td>Team/Individual Reviews</td>
<td>• Individual Action Sheets</td>
<td>Individual Contributors</td>
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### STRATEGY SESSION AGENDA

<table>
<thead>
<tr>
<th>Item</th>
<th>Responsibility &amp; What to Bring</th>
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<tbody>
<tr>
<td>Overview – Clarify the Agenda</td>
<td>CEO</td>
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<tr>
<td>Corporate Scorecard Status</td>
<td>CEO</td>
</tr>
<tr>
<td>1. Report on corporate KPIs – on and off target</td>
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<tr>
<td>Dept. Scorecard Status:</td>
<td>Department Manager</td>
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<tr>
<td>1. Note accomplishments.</td>
<td>Bring overall &quot;team action sheet&quot; and &quot;department full plan with status&quot;.</td>
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<tr>
<td>2. Report on status of your goals and measures.</td>
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<td>3. Determine steps to get off track items back on track.</td>
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<tr>
<td>Strategic Issues/Topics:</td>
<td>Issue leader</td>
</tr>
<tr>
<td>1. Address any items that came up in the team updates.</td>
<td>Bring issue briefing material</td>
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<td>2. Discuss (formally or informally) strategic issues in order of critical importance to the business. (Brief the issue, identify alternatives, suggest solutions, identify next action.)</td>
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<tr>
<td>Meeting Review</td>
<td>CEO</td>
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STRATEGY REVIEW SESSION QUESTIONS

- What were our three most important strategic accomplishments of the last 90 days - how have we changed our field of play in the past 90 days?
- What are the three most important ways we fell short of our strategic potential?
- In the last 90 days, what are the three most important things that we have learned about our strategy? (NOTE: We are looking for insight to decision to action observations.)

TIPS AND TRICKS

- Good strategic thinking is hard - work at it!
- Strategy is “yours” not “theirs”
- Using the plan to guide decisions - that means everyone in this room
- Think “coordinated” action
- Drive for a clear understanding of your part
- Zoom out and then zoom in
STRATEGIC PROCESS EVALUATION

Test Your Strategy:

- Will your strategy beat the market?
- Does your strategy tap a true source of advantage?
- Is your strategy granular about where to compete?
- Does your strategy put you ahead of trends?
- Does your strategy rest on privileged insights?
- Does your strategy embrace uncertainty?
- Does your strategy balance commitment and flexibility?
- Is your strategy contaminated by bias?
- Is there conviction to act on your strategy?
- Have you translated your strategy into an action plan?

(McKinsey Article)

SO YOU HAVE A STRATEGIC PLAN... NOW WHAT?

5 Keys to Implementation
5 KEYS OF IMPLEMENTATION

1. Culture
2. People
3. Resources
4. Structure
5. Systems
IMPLEMENTATION PITFALLS

- Annual Strategy
- Lack of Communication
- Lack of Empowerment
- Lack of Ownership
- A Meaningless Plan
- No Accountability
- No Progress Report
- Not Considering Implementation
- Out of the Ordinary
- An Overwhelming Plan

YOUR CHECKLIST

- Get broad and diverse input from the beginning.
- Make the strategy personal - what is my role?
- Build the strategy to execute it - who is doing what when.
- Publish a year-long calendar.
- Set up your strategy alert triggers.
- Identify the types of measures you need to use, the source of the data and frequency.
- Hold regular, consistent strategy reviews - decide on monthly or quarterly.
- Keep your plan up to date.
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

Strategic Plan Review

Plan Set-Up

Strategy Support

Customer / Employee Surveys

Execution Workshop

UPCOMING TRAININGS

- Strategic Planning 101
  October 2 | 12 p.m. PT

- Setting Strategic Objectives and Cascading Goals
  October 9 | 9 a.m. PT

- Execution, Execution, Execution
  October 24 | 9 a.m. PT
To view one of our latest white papers titled, “So You Have a Strategic Plan...Now What?”
Go to:
http://mystrategicplan.com/get-your-game-on/

Contact Information

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Reno, Nevada 89501
(775) 747-7407 ph

admin@mystrategicplan.com

Our office hours are Mon-Fri 9am-5pm (PT).