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

- Winston Churchill, British PM
ONSTRATEGY 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

ONSTRATEGY 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 OnStrategy
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?

- **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?

CREATE A CADENCE OF ACCOUNTABILITY

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- **Planning**
  - Strategic Planning:
    - Strategy Plan Approved
  - Annual Planning:
    - Complete Development of Action Plans for FY 14-15
  - Budgeting:
    - Budget Development for FY 14-15
    - Budget for FY 14-15 Approved
  - Community Engagement:
    - One Page Plan

- **Execution**
  - Staff Progress Reporting:
    - Q1 Progress Report to Board
    - Q2 Progress Report to Board
    - Q3 Progress Report to Board
    - Q4 Progress Report to Board
  - Department Action Plans:
    - All Staff

- **Board of Trustees**
  - Pres./CEO
  - Department Directors
  - All Staff
**QUARTERLY STRATEGY REVIEW - OVERVIEW**

- **Month 1: Operations Review**
  - Core departmental-level leadership team.
  - Key staff.

- **Month 2: Operations Review**

- **Month 3: Strategy Review**
  - 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**

- **Month One**
  - Department Review (1-2 hrs)
  - Roll-out (beginning)
  - Or Adaptive guidance (if necessary)

- **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

- **Annual Strategy Update**
  - **Strategy Development**
  - **Strategy Execution**

- **Issue Prep**
  - Teams prepare info about 2 strategic issues and external environment review.

- **Qtrly Board Report**

*OnStrategy*
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

Team Member Online Status Update
Department Leader Online Status Update

Week One
Week Two
Week Three
Week Four

Issue Prep

Dept. Operations/Strategy Review (1 hour)
Senior Management Team Operations/Strategy Review (1/2 day to 1 day)
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 (Qrtly Townhall (All))</td>
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<tr>
<td></td>
<td>Mission</td>
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<td></td>
<td>FY13 &amp; 14 Corp Goals</td>
<td></td>
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<tr>
<td>Managers</td>
<td>FY13 &amp; 14 Department Goals</td>
<td>Department Monthly Strategic (Dept. Managers with their Team Leads &amp; All Staff)</td>
</tr>
<tr>
<td>Teams</td>
<td>FY13 Team Goals</td>
<td>Weekly Tactical (Dept. Managers with their Team Leads &amp; All Staff)</td>
</tr>
<tr>
<td>All Staff</td>
<td>FY13 Individual Goals</td>
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<td></td>
<td>Weekly To-Dos</td>
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</table>

### Distributed execution management to drive results

**HOW TO TRACK YOUR PROGRESS USING ONSTRATEGY**
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

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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>
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<tr>
<td>All Staff</td>
<td>FY13 Individual Goals</td>
<td>Milestone Status</td>
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</table>

OnStrategy
RUNNING A STRATEGY REVIEW MEETING
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>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Strategy Review Meeting</td>
<td>• Executive Summary with Progress</td>
<td></td>
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<tr>
<td></td>
<td>• Dept. Action Sheet</td>
<td>CEO</td>
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<tr>
<td></td>
<td>• The Dash</td>
<td>Department Managers</td>
</tr>
<tr>
<td>Department/Functional Strategy Review Meeting</td>
<td>• Dept. Executive Summary with Progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Individual Action Sheets</td>
<td>Department Manager</td>
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<tr>
<td></td>
<td>• The Dash</td>
<td>Individual Contributors</td>
</tr>
<tr>
<td>Team/Individual Reviews</td>
<td>• Individual Action Sheets</td>
<td>Individual Contributors</td>
</tr>
</tbody>
</table>

OnStrategy
STRATEGY SESSION AGENDA

<table>
<thead>
<tr>
<th>Item</th>
<th>Responsibility &amp; What to Bring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview – Clarify the Agenda</td>
<td>CEO</td>
</tr>
<tr>
<td>Corporate Scorecard Status</td>
<td>CEO</td>
</tr>
<tr>
<td>1. Report on corporate KPIs – on and off target</td>
<td></td>
</tr>
<tr>
<td>Dept. Scorecard Status:</td>
<td>Department Manager</td>
</tr>
<tr>
<td>1. Note accomplishments.</td>
<td>Bring overall “team action sheet”</td>
</tr>
<tr>
<td>2. Report on status of your goals and measures.</td>
<td>and “department full plan with status”.</td>
</tr>
<tr>
<td>3. Determine steps to get off track items back on track.</td>
<td></td>
</tr>
<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>
</tr>
<tr>
<td>2. Discuss (formally or informally) strategic issues in order of critical importance to the business.</td>
<td>(Brief the issue, identify alternatives, suggest solutions, identify next action.)</td>
</tr>
<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)
5 Keys to Implementation

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

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## GET EXPERTISE WHEN YOU NEED IT
ONE-ON-ONE GUIDANCE FOR THOSE TROUBLE SPOTS IN YOUR PLANNING

[mystrategicplan.com/strategic-planning-consulting](http://mystrategicplan.com/strategic-planning-consulting)

- Quick Start Coach
- Strategy Support
- Strategic Plan Review
- Customer / Employee Surveys
- Plan Set-Up
- Execution Workshop
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/

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