

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

- Winston Churchill, British PM

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ONSTRATEGY TRAINING

EXECUTION, EXECUTION,
EXECUTION

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

We love what we do!



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ONSTRATEGY OVERVIEW



Create Strategy Faster(er)



Empower the Team



Manage Execution

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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?



Our Strategy Management Process

Impact
Engage. Inspire. Execute.

Getting started: ✓ Planning team ✓ Create schedule ✓ Gather documents

Determine Position	Develop Strategy	Build the Plan	Manage Performance
Strategy Issues: Identify strategic issues to address	Mission: Determine your organization's core purpose.	Use SWOT: Process the SWOT to set priorities.	Rollout: Communicate strategy to whole organization
Industry & Market Data: Identify market opportunities and threats	Values: Identify your core beliefs.	Organizational Goals: Set short-to-mid-term SMART goals. (1+ yr.)	Set Calendar: Establish schedule for progress reviews
Customer Insights: Assess current satisfaction and future demand.	Vision: Create an image of what success looks like in 5 years.	KPIs: Select key performance indicators to track progress.	Leverage Tools: Train team to use MyStrategicPlan
Employee Input: Determine strengths and weaknesses.	Competitive Advantages: Solidify your unique position	Department Goals: Cascade org goals to departments. (12 months)	Adapt Quarterly: Hold progress reviews and modify
SWOT: Synthesize the data into summary SWOT items.	Org. Wide Strategies: Establish the approach for how you will succeed	Team Member Goals: Cascade dept. goals to individuals.	Update Annually: Review end of year, plan next year.
	Long-Term Objectives: Develop a 3 year balanced framework of 6 or less objectives.	Budget: Align a one-year budget with the plan.	
	Forecast: Develop a 3-year financial projection.		



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”

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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?

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TIPS

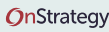
1. Narrow the focus - select high priority goals.
2. Empower the team to act on lead measures.
3. Make progress visible - weekly.
4. Create a cadence of accountability.

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QUESTIONS TO ASK

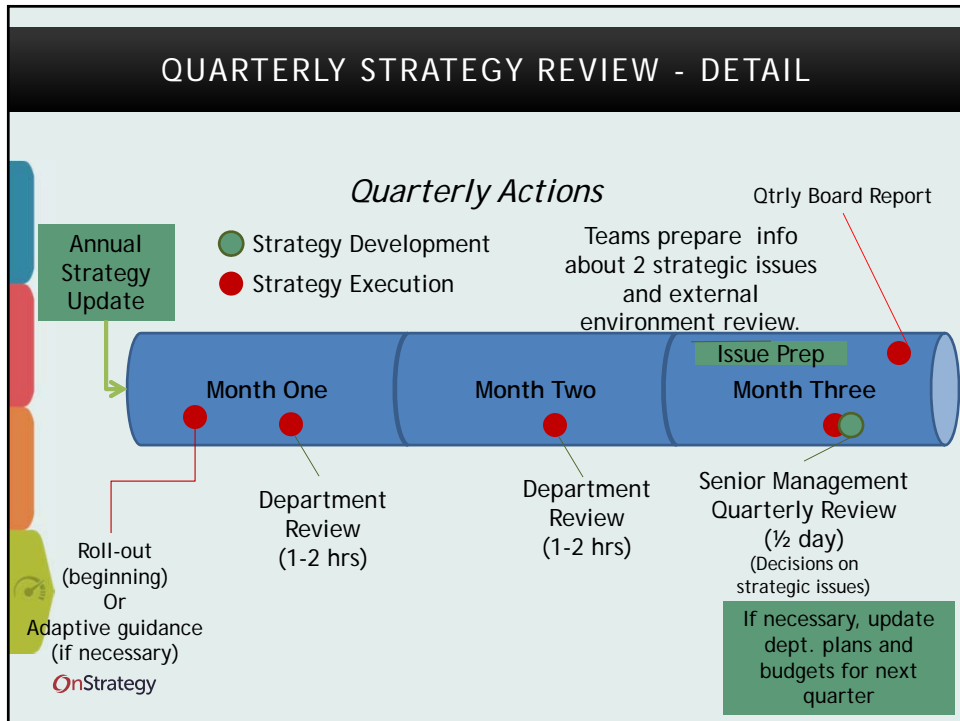
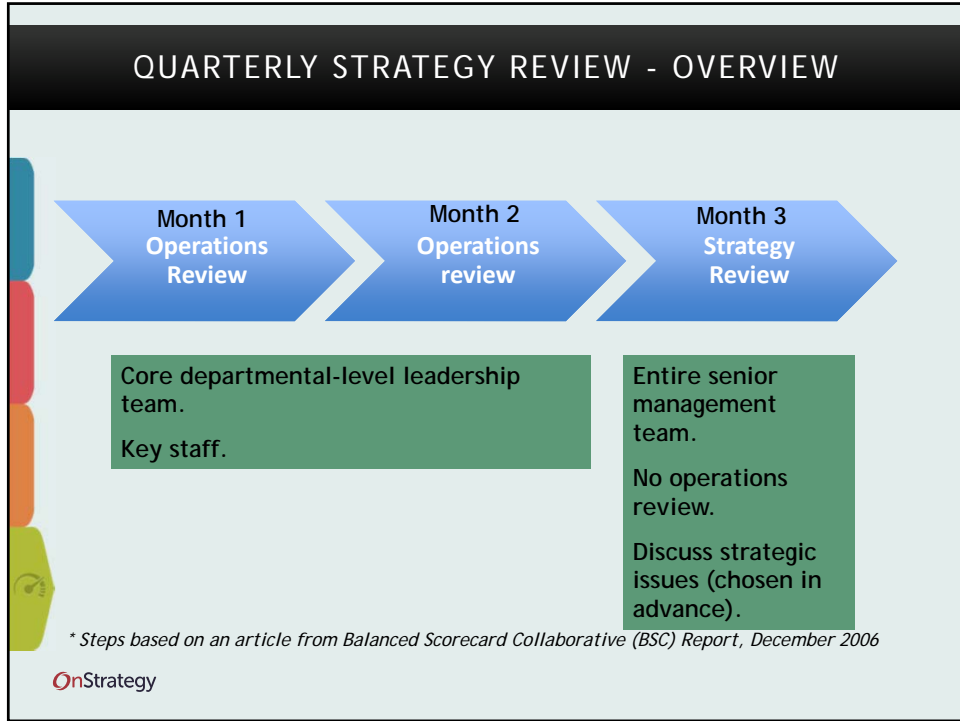
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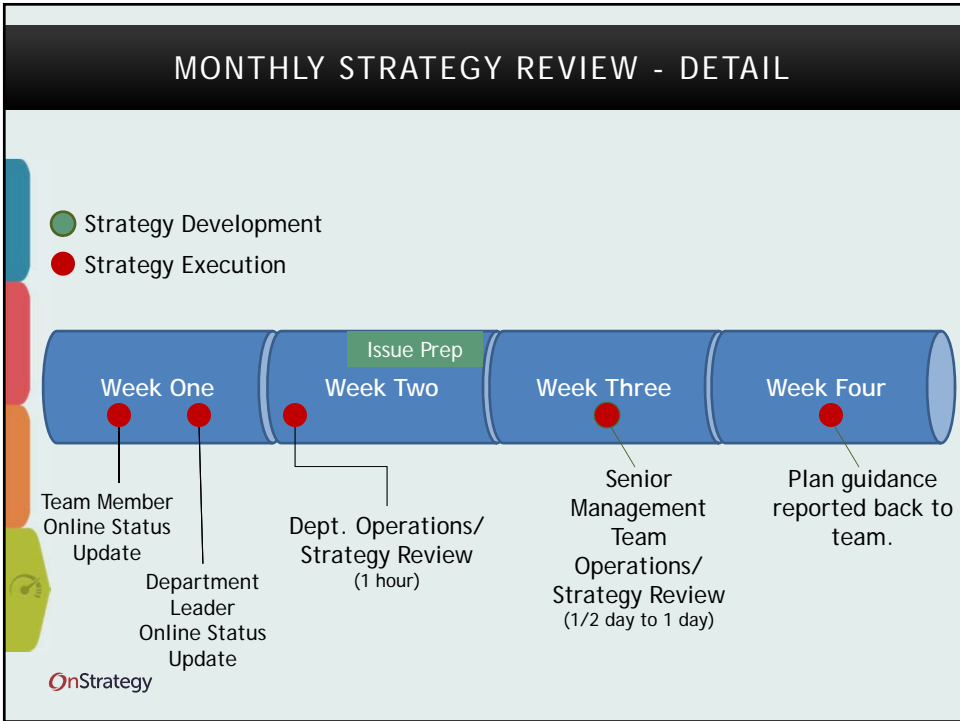
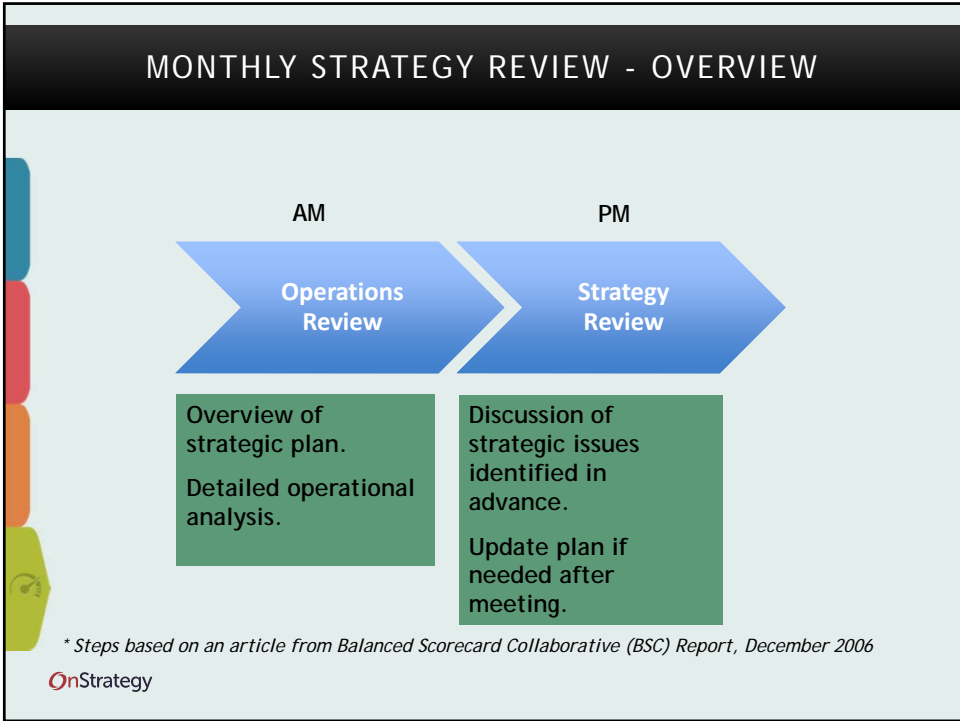


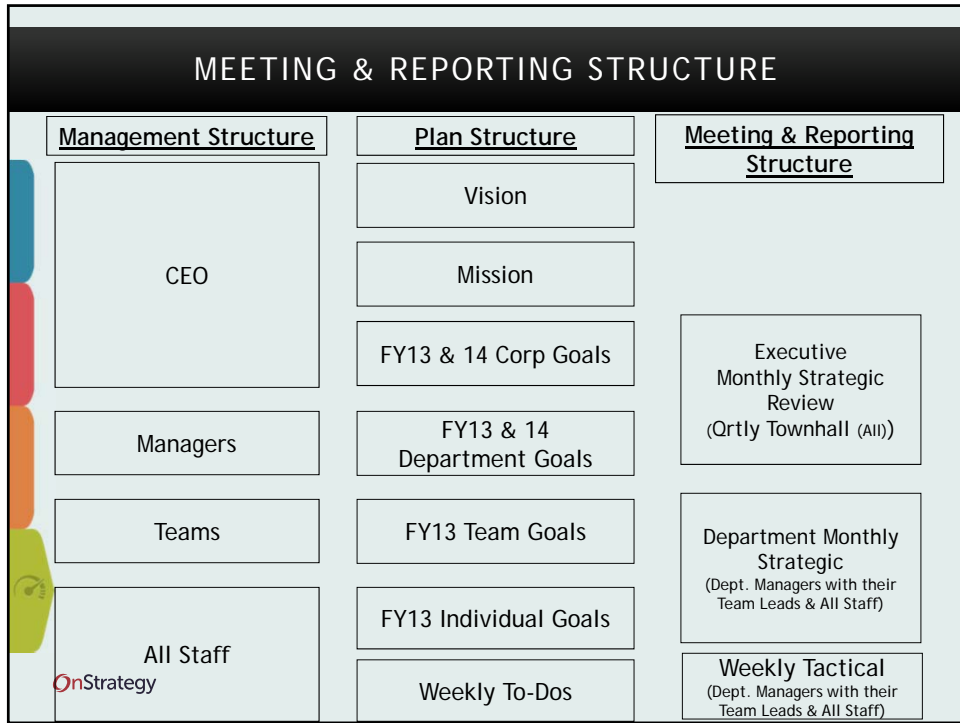
CREATE A CADENCE OF ACCOUNTABILITY

		July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Required Reports
Planning	Strategic Planning	Strategic Plan Approved							Review/Modify Strategic Plan for FY 14-15					<ul style="list-style-type: none"> Comprehensive Strategic Plan Strategic Plan Brochure
	Annual Planning	Complete Department Action Plans for FY 13-14 and FY 14-15												<ul style="list-style-type: none"> Department Action Plans Team Member Action Plans
	Budgeting						Begin Developing Budget for FY 14-15	Budget Calibration for FY 13-14			Budget for FY 14-15 Sent for Approval	Budget Approved for FY 14-15		<ul style="list-style-type: none"> Current Year Budget Current Year YTD CapEx Expenditures
Engagement	Community Engagement													<ul style="list-style-type: none"> One-Page Plan Strategic Plan Brochure
	Staff Comm.													<ul style="list-style-type: none"> Comprehensive Strategic Plan
Execution	Board Progress Reporting		Pre-planning Report to Board during retreat			Q1 Progress Report to Board			Q2 Progress Report to Board			Q3 Progress Report to Board		<ul style="list-style-type: none"> Executive Summary with Progress Strategy Review PowerPoint
	Staff Progress Report				QBR			QBR			QBR			<ul style="list-style-type: none"> Department Action Plans


 Board of Trustees
 Pres./CEO
 Department Directors
 All Staff







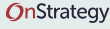
KNOWING WHAT YOU ARE TRACKING

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.

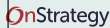
- Sum: \$ in revenue, # of new customers
- Average: Profit margin %, number of returns, days on hand
- Highest number: Running totals
- Lowest number: Error rates, defects
- Current: # of customers


- **Source:** Note the source for easy of updating
- **Frequency:** Identify metrics that are tracked monthly



WHO IS RESPONSIBLE FOR WHAT

<u>Management Structure</u>	<u>Plan Structure</u>	<u>Accountability Structure</u>
CEO	<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Vision</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Mission</div> <div style="border: 1px solid black; padding: 2px;">FY13 & 14 Corp Goals</div>	Lag Measures
Managers	FY13 & 14 Department Goals	Lead Measures
Teams	FY13 Team Goals	
All Staff	FY13 Individual Goals	Milestone Status





Platform Cheat Sheet

1775.747.7407 • www.OnStrategyHQ.com

1. Getting started


1. Go to: www.OnStrategyHQ.com
Login feature in is at the upper right hand corner of the home page.
2. Login:
Username: Your email address (case sensitive)
Password: XXXXXXXXX

Please enter valid e-mail and password

Email Address:

Password:

3. Update your status & track your progress

1. Go to Performance > Track Performance
2. Update Your Progress when you see a pencil 

Track Performance

What's Your Progress?

I'm done

I'm working on it

I haven't started / I'm behind

I need to do this

I'm waiting on someone

I'm late

2. Add/revise/update your goals & actions

1. Go to Plan > Goals

Setup Goals

If you want to remove your goal, please remove your goal first.

Goal Name:

Start Date:

End Date:

Status:

Priority:

Assign To:

Save

2. Add, revise, or delete what is assigned to you by clicking on the item.

Goals, Initiatives and Tasks

+ = Add Item

- = Delete Item

= Save changes

= View or create supporting items

Tip: Can't edit an item? That means you don't have permission to change it. Here is how permissions work:

- 1. Strategy Objective (Strategy leader only)
- 1.1. Organization Goal (Strategy leader only)
- 1.1.1. Department Goal (Department manager only)
- 1.1.1.1. Team Member Goal (Team member only)
- 1.1.1.1.1. Team Member Action Goal (Team member only)

Tip: Don't see your whole plan? Click on the "All" button on the top left of the screen.

4. Reports for your meetings

1. Reports > Department Plan
Download your Full Plan with Status to see item and progress.
2. Reports > Individual Contributors
Download your Action Plan report to view actions, status and comments.



The monthly or quarterly review meeting is the heartbeat of the strategy management process.

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REPORTS TO USE

Purpose	Reports	Who
Executive Strategy Review Meeting	<ul style="list-style-type: none"> Executive Summary with Progress Dept. Action Sheet The Dash 	<p>CEO</p> <p>Department Managers</p>
Department/Functional Strategy Review Meeting	<ul style="list-style-type: none"> Dept. Executive Summary with Progress Individual Action Sheets The Dash 	<p>Department Manager</p> <p>Individual Contributors</p>
Team/Individual Reviews	<ul style="list-style-type: none"> Individual Action Sheets 	Individual Contributors

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STRATEGY SESSION AGENDA

Item	Responsibility & What to Bring
<u>Overview – Clarify the Agenda</u>	CEO
<u>Corporate Scorecard Status</u> 1. Report on corporate KPIs – on and off target	CEO
<u>Dept. Scorecard Status:</u> 1. Note accomplishments. 2. Report on status of your goals and measures. 3. Determine steps to get off track items back on track.	Department Manager Bring overall "team action sheet" and "department full plan with status".
<u>Strategic Issues/Topics:</u> 1. Address any items that came up in the team updates. 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.)	Issue leader Bring issue briefing material
<u>Meeting Review</u>	CEO

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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

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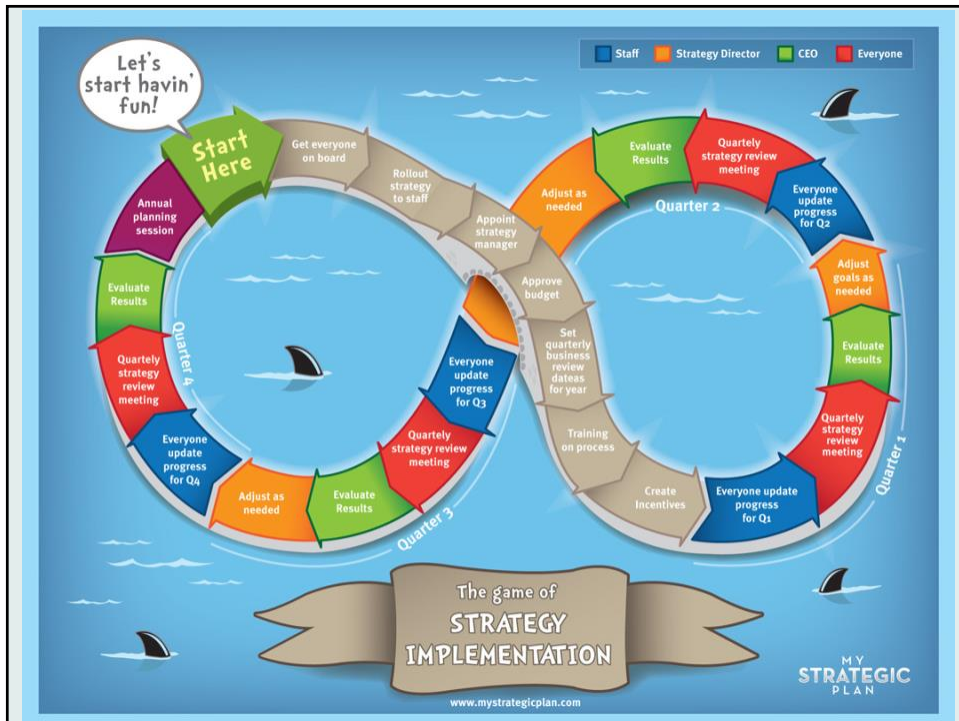
STRATEGIC PROCESS EVALUATION

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?

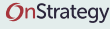
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(McKinsey Article)



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



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	 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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