

OnStrategy

**SESSION #6: MANAGE
PERFORMANCE**

PLANNING SESSION AGENDA

- I. Strategy Check
- II. Plan Rollout
- III. Establishing our Implementation Process

PHASE 4: MANAGE PERFORMANCE

Our Strategy Management Process

Impact

Engage. Inspire. Execute.

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



Determine Position

Strategy Issues: Identify strategic issues to address

Industry & Market Data: Identify market opportunities and threats

Customer Insights: Assess current satisfaction and future demand.

Employee Input: Determine strengths and weaknesses.

SWOT: Synthesize the data into summary SWOT items.



Develop Strategy

Mission: Determine your organization's core purpose.

Values: Identify your core beliefs.

Vision: Create an image of what success looks like in 5 years.

Competitive Advantages: Solidify your unique position

Org. Wide Strategies: Establish the approach for how you will succeed

Long-Term Objectives: Develop a 3 year balanced framework of 6 or less objectives.

Forecast: Develop a 3-year financial projection.



Build the Plan

Use SWOT: Process the SWOT to set priorities.

Organizational Goals: Set short-to-mid-term SMART goals. (1+ yr.)

KPIs: Select key performance indicators to track progress.

Department Goals: Cascade org goals to departments. (12 months)

Team Member Goals: Cascade dept. goals to individuals.

Budget: Align a one-year budget with the plan.



Manage Performance

Rollout: Communicate strategy to whole organization

Set Calendar: Establish schedule for progress reviews

Leverage Tools: Train team to use MyStrategicPlan

Adapt Quarterly: Hold progress reviews and modify

Update Annually: Review end of year, plan next year.

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STRATEGY CHECK

Elements of a Strategic Plan

1. What does success look like? (Vision)
2. Why do we exist? (Mission)
3. How will we behave? (Values)

SWOT: Diagnosis of the current situation

4. How will we succeed? (Strategic Objectives)
5. What is most important right “now”? (Initiatives)
6. How will we measure success? (KPIs)
7. Who must do what? (Tactics)

STRATEGY 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?

ROLLOUT

LEADERSHIP & STRATEGY

What sets leaders apart:

Focusing on the future

**Clearly communicating the future and
people's stake in that future**

**Where the organization is on the path
from here to there**

COMMUNICATING WITH CLARITY

Repetition: Don't be afraid to repeat the same message, again and again

Simplicity: The more complicated the message, the more potential for confusion and inconsistency

Multiple mediums: People react to information in many ways; use a variety of mediums

Cascading messages: Leaders communicate key messages to direct reports; the cycle repeats itself until the message is heard by all

Set clear expectations: Communicate where we go from here. What can they expect after today


MAKE SURE THAT ALL STAKEHOLDERS GET THE RIGHT INFORMATION NEEDED TO EXECUTE.

	Strategy	Execution
Public, citizens, customers	<u>Websites</u> , <u>summary sheets</u>	Newsletters, <u>press releases</u>
Board	Executive summary	KPI Dashboard
Senior Staff	Full Strategic Plan	KPI Dashboard
Managers	Department Plans	Dept. Dashboard
Staff	Individual Plan	Status report

ONE-PAGE STRATEGIC PLAN

STRATEGIC PLAN											
FOUNDATION	STRATEGIC PRIORITIES (3 YEAR), COMPANY GOALS (1 YEAR), ACTIONS (90 DAYS)	KEY PERFORMANCE INDICATORS									
Our Mission - Why do we exist?	Financial Results	How we measure success?									
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Our Core Values: How will we behave?	Customer Success										
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	Internal/Operational Excellence										
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COMPETITIVE ADVANTAGE & STRAT.		VISION									
How will we win?		Where are we going?									
How will we play?		IMPLEMENTATION									
		How will we hold ourselves accountable?									

STRATEGIC PLAN AT-A-GLANCE



North Slope Borough School District

2010-2015 Strategic Plan Summary

Prepared by M7 Planning

MISSION STATEMENT

Learning in our schools is rooted in the values, history and language of the Iñupiat. Students develop the academic and cultural skills and knowledge to be:


- Critical and creative thinkers able to adapt in a changing environment and world;
- Active, responsible, contributing members of their communities; and
- Confident, healthy young adults, able to envision, plan and take control of their destiny.

VISION STATEMENT

We envision...
Our students graduate prepared and qualified to excel as productive citizens in the world, and able to integrate Iñupiat knowledge and values with Western ways. Our curriculum is culture-based, our attendance rate is above the state average, our parents and community members are committed to education and meaningfully engaged, more of our teachers are our own graduates and speak Iñupiaq, and our schools reflect who we are as people.

CORE VALUES

Our Guiding Principles are:



EDUCATIONAL PHILOSOPHY

Education, a lifelong process, is the sum of learning acquired through interactions with one's environment, family, community members, schools, and other institutions and agencies. Within the Home Rule Municipality of the North Slope Borough, "schooling" is the specific, mandated responsibility of the North Slope Borough School District Board of Education. The Board of Education is committed to providing academic excellence in the "schooling" environment. This commitment to academic excellence shall focus on the learner, recognizing that each student brings to the "schooling" environment his own interest, learning styles, cultural background and abilities.

STRATEGIC PLAN-AT-A-GLANCE

(2011-12 SCHOOL YEAR)



INSTRUCTIONAL FOCUS STRATEGIC GOALS & DISTRICT OBJECTIVES

1 All students will reach their intellectual potential and achieve academic success through integrating Iñupiaq knowledge systems into the core content areas.

- 1.1 Curriculum Alignment, Integration & Mapping: Complete Year 2 of the cycle for K-12 curriculum alignment, integration and mapping in language arts, math and science.
- 1.2 Academic Success: Students will excel in academic areas higher than State or National Standards.
- 1.3 Qargi Concept: Establish the Qargi Concept at each site by Fall 2014.

COMMUNITY AND FAMILY ENGAGEMENT STRATEGIC GOALS & DISTRICT OBJECTIVES

2 We will actively engage parents, Elders, businesses and the community as partners in our children's education.

- 2.1 Improve School Climate: Improve the school climate.
- 2.2 Board: One board member will visit each village once per year to host community dialogue.
- 2.3 Parent Engagement: Create Parent Buy-In to drive attendance through focus on parent education and resources.
- 2.4 Elders: Provide the opportunity for interested Elders to be involved in academics.
- 2.5 Partnerships: Increase community and business partnerships.
- 2.6 Calendar: Define with each community what a culturally sensitive calendar that maintains an academic focus throughout looks like.
- 2.7 Iñisavik Partnership: Transform the pre-K3/K4 program into a lab school to build local capacity needed to develop and sustain language nests slope wide, in partnership with Iñisavik. (Contingent on funding)
- 2.8 Iñupiaq Language: Share responsibility for perpetuating the Iñupiaq language by initiating dialogue with community and elders.

STAFF & BOARD DEVELOPMENT STRATEGIC GOALS & DISTRICT OBJECTIVES

3 We will continually strengthen the recruitment, retention and professional development of highly effective staff.

- 3.1 Hiring and Recruiting: Improve the hiring and on-boarding process for all employees by incorporating elements from the human resources audit.
- 3.2 Retention: Maintain a staff turnover rate lower than the Alaska rural average.
- 3.3 Training and Development: Provide professional development and succession planning for certified and classified employees in support of the goals in the strategic plan.
- 3.4 Local Workforce: Maximize our local workforce by growing and employing local staff.
- 3.5 Certification Program: Design an Indigenous Teacher Certification program, modeled after Hawaii, to increase the number of Iñupiaq people certified as teachers (working in collaboration with Iñisavik College and other education partners).

ORGANIZATIONAL AND FINANCIAL STEWARDSHIP STRATEGIC GOALS & DISTRICT OBJECTIVES

4 We will effectively employ our financial and operational resources to support our strategic goals.

- 4.1 Transparency: Continue to improve and implement transparency and credibility by strengthening financial policies and controls in the budget process. (Tammy & Fred)
- 4.2 Learning Environment: Provide classroom environments conducive to learning through proactive operational support. (Pat & Fred)
- 4.3 Technology: Evaluate the adequacy of technology as a tool to facilitate learning, communication and collaboration, especially in the villages, through the EED technology plan process.
- 4.4 Communication: Foster effective and collaborative communication to sustain a culture of unity and trust.
- 4.5 Endowment: Create a non-profit endowment.





VIDEO GAMING TECHNOLOGIES, INC.



MISSION STATEMENT

Our Mission is to provide superior gaming entertainment:

- Players win with a fun & rewarding gaming experience
- Customers win through exceptional products and service
- Associates win by being part of a culture of excellence, innovation and uncommon achievement

SLOGAN

"We Create Winners!"

VISION STATEMENT

VGT will be one of the top three most profitable US-based manufacturers of gaming machines, dominating the participation market.

Our vision is to triple our business in the next five years. VGT will be one of the top 3 manufacturers of gaming machines as measured by revenue and profit. We will demonstrate excellence in the innovation and creation of unique gaming machines. The industry will envy our profit margins and ability to achieve long-term recurring revenue partnerships with our customers. We drive quality as evidenced through winning the Malcolm Baldrige Quality Award. VGT will be voted the best company to work for in the gaming industry.

At VGT, we will measure excellence through looking at units placed against similar products in our market. We will achieve at least 20% of the market share with a 5-year focus in North America. Our win per unit will exceed 10% above the average. We will achieve 40-50% of total revenue outside of Oklahoma. We will sustain the lease share model at a rate comparable to market average. And, our customer and player surveys will reflect the highest level of satisfaction.

In the next five years, VGT will have great success and our associates will share in it.



CORE VALUES

- We will **Respect** our associates and **Value** their contributions.
- We will compete with **Passion** and **Integrity**.
- We will **Communicate** openly and honestly.
- We will cultivate **Excellence** and **Innovation**.
- We will foster a **Fun** and **Rewarding** work environment.
- We will encourage a culture of **Collaboration** and **Accountability**.
- We will **Do the Right Thing**.

SAVING YOUR DECISIONS

Generate [Reports Here.](#)

IMPLEMENTATION

WHITEBOARD VIDEO

OnStrategy



[The Secret To Strategic Implementation](#)

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

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:

Syncing checking in with your plan into the “rhythm of your business”

QUESTIONS TO ASK

- **Structure:** How will you integrate the strategic plan with your *rhythm of business*?
- **Communication Schedule:** When will you expect your team to update their performance and when will you report progress to staff, your board, or other stakeholders?
- **Strategy Leader:** Who will keep this process on track and relevant?
- **System & Reports:** How will you make implementing the plan easy for your team and what are you expecting each staff member to come prepared with to those strategy review sessions?

POTENTIAL IMPLEMENTATION STRUCTURE

Meeting Type	Time Required	Attendees	Purpose/Format
Weekly Tactical	60 Mins	Exec Team	Share weekly priorities, activities and resolve any runway issues. Focus is next 5-10 days
Monthly Strategy Review	90 mins	Exec Team, Key Managers	Review the performance of the organization, clarify key accomplishments and focus areas for the next month to ensure you are driving accountability and results.
Quarterly Deep Dive	2-4 hours	Planning Team	Review the performance of the organization, decide upon critical issues affecting long-term success – dial in execution challenges
Annual Offsite	1-2 days	Planning Team	Deep dive in to critical issues, brainstorming & problem solving. Updating the plan for the next year.

CREATE A CADENCE OF ACCOUNTABILITY

	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Required Reports	
Planning	Strategic Plan Approved							Review/ Modify Strategic Plan for FY 14-15					<ul style="list-style-type: none"> Comprehensive Strategic Plan Strategic Plan Brochure 	
	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
							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 	



A TYPICAL STAFF MEETING

Typical

- Tactics are discussed absent of any context
- Priorities are identified based on the whims of the leader or the subjective assessment of individual team members
- Last week's actions are forgotten
- People leave feeling overwhelmed

Better

- Actions are discussed in the context of strategic priorities
- Priorities are determined based on data
- People see how their previous actions impacted the organization
- People leave focused on how they will make a difference this week

WEEKLY MEETING AGENDA - TEMPLATE

I. Overall activity for the week

- Wins & Kudos from last week
- Weekly Meetings
- Weekly Logistics

II. Metric Review

- What is the metric update?
- What was the focus for last week?
- What is the focus for this week?

III. Operational Call Outs

- Any concerns or items of note or this week
- Asks of the group

IV. Round Robin Report Out (2 min. each)

MONTHLY MEETING AGENDA - TEMPLATE

- I. Welcome & Introductions
- II. Customer Perspective
- III. Operational Perspective
- IV. People Perspective
- V. Financial Perspective
- VI. Special Topics
- VII. Wrap Up & Focus for Next Month

REPORT-OUT FLOW

- For each corporate goal, report out:
 - Comment on the performance of the key metric-movement from last month.
 - Going well - what movement results are we seeing? And why?
 - Not going well - what are we concerned about? What are we doing about it?
 - Note learnings - what did we learn last month?

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.

RECAP

1. Connect the day-to-day with your strategy
 - a) Vision
 - b) Strategic Objectives
 - c) Cascaded Goals
 - d) Clear Measures
2. Come Prepared
 - a) Prep Dashboards
 - b) Update Metrics
3. Stay on Topic
 - a) Stick to the agenda
 - b) Focus on the critical few
 - c) Let the data speak

WHITEBOARD VIDEO

OnStrategy

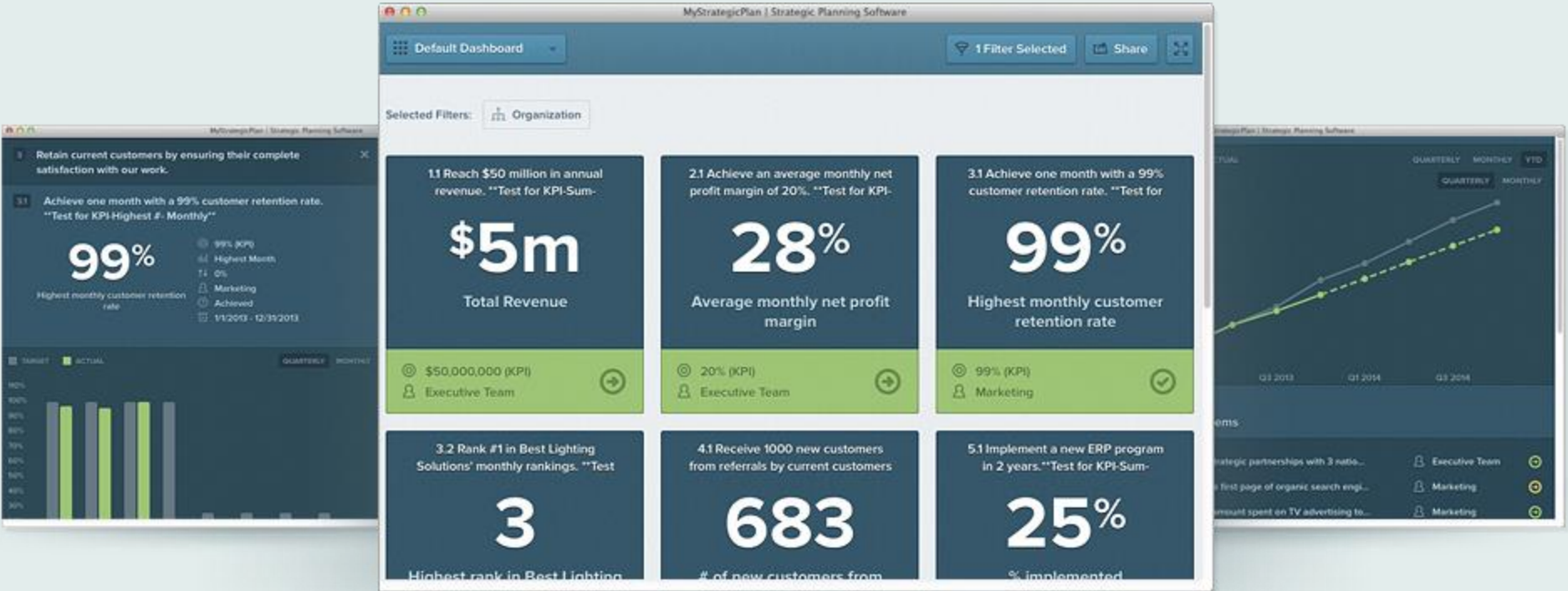


[Running A Great Strategy Review](#)

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. or S.O. 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

EXAMPLE DASHBOARD



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.)

PITFALLS TO AVOID

- ✓ Thinking that staff is not interested in corp. direction.
- ✓ “I’ll get to it later.”
- ✓ Not keeping score.
- ✓ Taking on too much. Not all goals are created equal.
- ✓ Talking about the plan only once.

COMMON PITFALLS

- Lack of ownership/accountability
- Lack of communication
- Getting mired in the day-to-day, “I’ll get to it later.”
- Not keeping score
- Unexpected events/crises
- Taking on too much. Not all goals are created equal.
- Not considering implementation
- Talking about the plan only once.

PLANNING TEAM NEXT STEPS

1. Schedule dates for your strategy review sessions
2. Rollout the plan to key stakeholders
3. Set up reminders to alert people to manage their performance on their strategic goals
4. Ensure a living, breathing plan by conducting your strategy review sessions and updating your plan according to your planning calendar