



OnStrategy

PLAYBOOK

OnStrategy's reference guide for getting a strategic management system up and running quickly.

Introduction

Welcome to OnStrategy! Ready to drive organizational focus, clarity and alignment? This resource is for you. We've collected our best-of-the-best thinking from working with thousands of organizations and put it all into the OnStrategy Playbook –it's much more than a user's guide. It's a guide of just the essentials to deploy a new management system, one that is focused on managing your organization strategically.

This Toolkit's Intended Outcome:

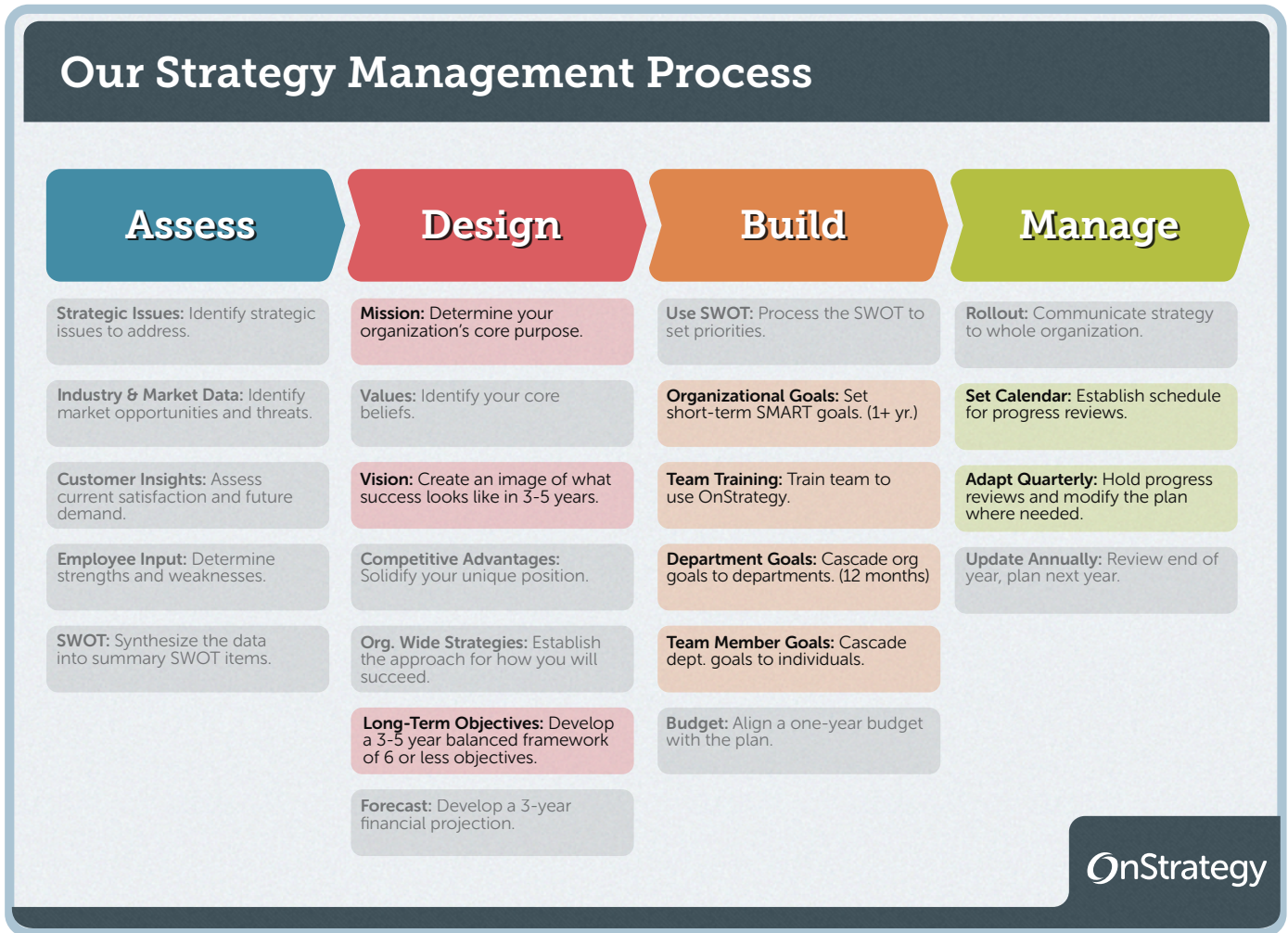
- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the OnStrategy platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have 3-5 goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Management Meetings:** Learn how to refine your existing senior team meetings to be driven by your strategic goal performance metrics.
- **Results:** Start seeing business results by focusing on what matters most and aligning your team to a unified direction.

What You'll Need for Success:

- **"CEO" Commitment:** A visible, consistent commitment to strategy from your senior management team.
- **Urgency:** Vigilance and dedication to keeping the process moving with unrelenting momentum.
- **A Dedicated Strategy Leader:** Your organization must have someone dedicated to nurturing and driving the process.
- **Agility and Flexibility:** You need to be flexible and agile to review progress and adapt the plan where needed.

This is NOT a Comprehensive Overview of the Strategic Planning Process

This Playbook gets the process of managing strategically up and running quickly so you can gain momentum. However, it does not take you through the strategic planning process in its entirety. Below is a diagram illustrating the areas this playbook covers within the entire strategic management process.



Do You Need A Complete Guide to Strategic Planning?



If you need a comprehensive overview of the planning process, see our Complete Guide to Strategic Planning.

[LEARN MORE](#)

Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the OnStrategy application is a dynamic, one-page strategic plan that communicates to everyone in your organization what the strategic focus is and how the organization is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The below image shows you a completed, active plan will look like when you are done.

The playbook walks you through how to build and manage a plan that looks like this – in just 4 steps.

Step 1: Build Your Mission and Vision

Step 2 & 3: Set Strategic Objectives and Goals

Step 4: Manage Your Team

Acme Corporation
Powered by MyStrategicPlan

Plan Performance Reports Dashboard Russell P.

MANAGE CARDS

Get the Most out of

THE ONSTRATEGY PLAYBOOK
SEE WHAT A GOOD PLAN LOOKS LIKE

Mission

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

Vision

We envision being THE technology experts and resource center for small and medium-sized organizations.

Core Values

Core Values:

- Professionalism - to be professional in our actions to our clients, partners and each other.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.

Strategic Objectives 60% 30 16 7 19

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year. **50% On Strategy** 9 9 3

Organization Goals	YTD Target	YTD Variance	Actual
1.1 1.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.2 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.3 1.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188

2. Customer Success – Professional Services: To be the professional partner of choice. **52% On Strategy** 6 3 3 9

3. Customer Success – Maintenance Contracts: To be viewed as the top technology resource in the western region. **73% On Strategy** 7 7

4. Internal/Ops – Innovation/Product Development: Continue to develop technology innovation. **64% On Strategy** 8 4 4

Next Steps

Manage Performance

Keep your team motivated and inspired

- ✓ Congratulate achievers!
- ✓ Nudge those falling behind

Strategy Expert

Zach, your strategy expert is just a click away

CALL: 775 747 7404 EMAIL

My Focus

Flagged (3)

1.1.1 Professional Consulting: Generate \$700,000 in web design consulting. **\$313k**

1.1.3 Generate \$300,000 from added software features by the end of each FY. **\$262k**

2.3.3 Develop 2 new webinars a quarter to assist the sales team. **1**

Active (12)

Recent Reports

Full Strategic Plan w/Progress 12/11/15

Strategy Review PowerPoint 11/21/15

Action Plan 11/20/15

Last Login

Shelby Cuellar 11/21/15

Jacob Sharkey 11/20/15

Christopher Pechacek 10/19/15

Step 1

Step 2-3

Step 4



Strategy Leader

I am a Strategy Leader who is responsible for driving the strategic planning process and aligning my organization to a unified direction.

[Click Here](#)



Manager

I'm a VP, Director, Manager, or Supervisor who is responsible for aligning my team's goals and priorities to help the organization achieve it's goals.

[Click Here](#)



Team Member

I am an individual contributor helping my organization realize its strategic potential by executing against my team's goals and actions.

[Click Here](#)



OnStrategy

STRATEGY LEADER ROLE

This section is for Strategy Leaders who are responsible for driving the strategic planning process and aligning their organization to a unified direction.



OnStrategy Playbook: Strategy Leader Role

This section is for Strategy Leaders who are responsible for driving the strategic planning process and aligning their organization to a unified direction.



STEP 1 Establish What Success Looks Like

Create Your Mission Statement

Create Your Vision Statement



STEP 2 Determine What's Most Important Right Now

Build Your Strategic Objectives Framework

Build your Organization's Goals



STEP 3 Identify Who Needs to do What

Track the Performance of Your Goals

Train Your Team to Develop Their Goals



STEP 4 Hold Your Team Accountable

Improve Your Weekly Meetings

Preparing for & Running Your Strategy Review

Customize Your Dashboard



STEP 1 Establish What Success Looks Like

Create Your Mission Statement

Create Your Vision Statement

Let's get started! Before you can focus your energy around what is most important, you need to first answer these two questions for your organization:

- **What is our core purpose? (Mission)**
- **Where are we going? What does success look like in 3-5 years? (Vision)**

Mission: Determine Your Organization's Core Purpose

A mission statement serves the purpose of defining your "field of play." What is "inside" that we do and what is "outside" that we are not going to do?

As a leader, you control whether the mission statement is a guide to your strategic direction, or whether it becomes trite, which occurs the minute decisions are made that are off mission.

Being strategic only happens when you make the hard choices required of leaders. **Develop a mission statement you can use to manage and one to make choices easier.**

Let's ditch everything that makes mission statements useless by:

- **Boldly stating your organization's core purpose:** Why do you exist? Nothing wishy-washy here.
- **Getting at the underlying why:** Why do you do what you do?
- **Using present tense:** So you don't mix it up with your vision statement.
- **Using concrete language:** So there is no question about what you do.

Create Your Mission Statement

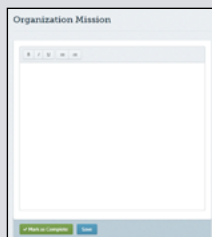
If you already have a Mission Statement:

1

Find your Mission Statement and copy it to your clipboard.

2

[Paste it into the Mission Statement page.](#)





If you don't have a Mission Statement or you want to improve an existing one:

1

[Watch the 4-min whiteboard video](#) to learn how you can create a great mission statement.

2

[Build your draft Mission Statement here.](#)

Organization Mission

Save Cancel

3

Stuck? Simply copy the statement below and paste it here to keep moving forward. You'll need to come back to this later.

Our mission is (use a verb in the present tense) + (tell us what you do) + (for whom you do it) resulting in (benefit of your work) + (location – optional).

What Does Good Look Like: Example Mission Statements

Here are a few of our favorite examples:

Google: "To organize the world's information and make it universally accessible and useful."

Walmart: "We save people money so they can live better."

Baylor University: "The mission of Baylor University is to educate men and women for worldwide leadership and service by integrating academic excellence and Christian commitment within a caring community."

Boy Scouts of America: "The mission of the Boy Scouts of America is to prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law."



Vision: Cast a Vision of What Success Looks Like

A vision statement is a declaration of where you are headed – your future state. In writing your vision statement, formulate a picture of what your organization’s future will be. We always explain your vision as “knowing what mountain you’re climbing,” and your mission as “what you are here to do.” Your vision is the statement that guides you from your current, Point A, to your ambitious future, Point B.

What does success look like 3-5 years from now?

A vision statement must be directional – pointing you and your team towards the place you aspire to be. For this to happen, the direction needs to be as clear as possible.

Is your vision fuzzy like a Monet? Or is it precise and crisp like a Norman Rockwell?



Claude Monet



Norman Rockwell

Be concise and craft your future direction in one or two sentences, which helps clearly communicate your vision. Use the “Vision Description” as a place for verbosity to paint with Norman Rockwell clarity.

Create Your Vision Statement

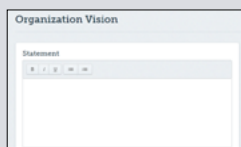
If you already have a Vision Statement:

1

Find your Mission Statement and copy it to your clipboard.

2

Paste it under the “Statement” section on the [Organization Vision page](#).

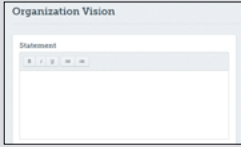


3

Write a one-sentence vision description for what success looks like in each area.



If you don't already have a Vision Statement or you want to improve an existing one:

- 1** [Watch this whiteboard video](#) to learn how to create an inspiring vision.
- 2** **Build your draft vision statement on the Vision Statement page.**

- 3** **Stuck? Simply copy the statement below and paste it in the "Statement" section.** You'll need to come back to this later.

We envision (use a verb in the future tense) + (describe the organization in the future or the impact on the world).
- 4** **Copy/Paste the outline below in the "Description" section.**
 - *Financial:*
 - *Customer:*
 - *Operational Excellence:*
 - *People Expertise:*
- 5** **Write a one-sentence vision description for what success looks like in each area.**

What Does Good Look Like: Example Vision Statements

Amazon.com: "Our vision is to be earth's most customer centric company; to build a place where people can come to find and discover anything they might want to buy online."

McDonald's: "To be the world's best quick service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile."

Susan G. Komen for the Cure: "A world without breast cancer."

Case Western Reserve University: "We aim to be recognized internationally as an institution that imagines and influences the future."

What Does Good Look Like: Examples of Perspective Vision Statements

1. **Financial:** Realize financial sustainability of profitable, 15% year-over-year growth, reaching \$100M in 5 years.
2. **Customer:** Top 3 player in the market positioned as "valued innovators" in the minds of our customers.
3. **Operational Excellence:** Scaled organizational infrastructure, with key processes & systems in place to achieve operational excellence
4. **People Expertise:** Passionate and growing team excited about the company and their careers



Expert Advice

- **Get to 80% and worry about the exact wording later, especially when working in groups.** Word choice can make us go in circles and wastes a huge amount of time.
- **Stay grounded in reality by assessing your internal and external operating environment.**
- Check your statements to make sure that your **mission clearly explains your core purpose in the present tense** and your **vision casts a clear picture, in the future tense, of where you're headed.**

Celebrate

If your mission clearly states why you exist and your vision paints a vivid picture of where you want to be, then you've got a solid direction. Ask yourself the following clarifying questions if you're not sure:

Mission:

- ✓ Does your mission statement avoid clichés and vague words? (Make sure it's real and relevant!)
- ✓ Is it specific enough to distinguish this organization from others in the same industry?
- ✓ Is it short and memorable? Does it fit on a t-shirt and would you wear it?

Vision:

- ✓ Does your vision represent the preferred future of the organization or your desired impact?
- ✓ Is it exciting and aspirational?

Once you've got your mission and vision, let's work on how you're going to get there!

"Great leaders do not define their vision by what it is not. Great leaders define their vision by what it is; they tell us where we are going. Kennedy didn't tell us we're not going to stay on the Earth, he told us we're going to the moon." - Simon Sinek



STEP 2 Determine What's Most Important Right Now

Build Your Strategic Objectives Framework

Build your Organization's Goals

Build Your Plan's Framework

Congratulations! You know what success looks like for your organization, now let's go get it. This section is all about focusing your team on what's critically important – nothing more, nothing less.

Plan Structure

Here is a visual of how you build an executable plan – from vision to individual actions. The key? Knowing the ownership of each level.



Strategic Objectives: Develop a Holistic Framework

Strategic objectives create the framework of your plan. Everything will cascade from these statements – think of them as almost mini vision statements for each area of your organization. Vision you say? We just did that! That's right – you already started strategic objectives in your vision description.

Don't know what your strategic objectives should be? Good strategic objectives are coordinated actions that address the situation your organization finds itself in. There is no better tool to summarize your organization's situation than a SWOT analysis. [Click here to start building your SWOT.](#)

But before we grab the vision descriptors, note that we recommend between 4 and 6 strategic objectives to make it easy to create a holistic set of strategic objectives. [Read more about our proven structure.](#)



Tip: Absolutely, positively no more than six total (this ensures the plan is focused).

Example Framework

Financial

1. Financial Success:

Customer

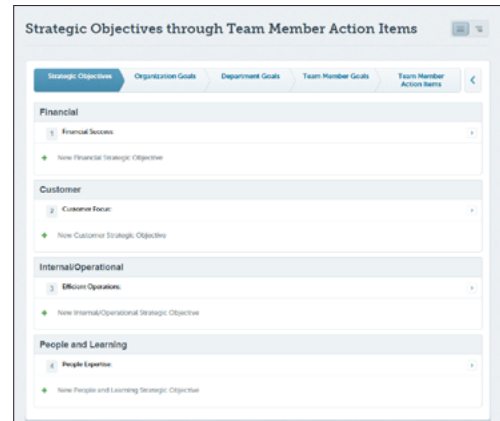
2. Customer Focus:

Internal/Operational

3. Efficient Operations:

People and Learning

4. People Expertise:



Build Your Strategic Objective Framework

Decide if you would like to use our pre-populated Strategic Objective labels or replace with your own.

Replaced with Your Own:

1

[Visit the Settings page.](#)

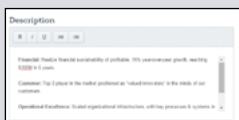
2

Under "Customized Terms" select the "Perspectives" menu, **rename the plan perspectives to match your organization's structure.** Click save changes when you are finished.



3

Copy one of your vision descriptors from the [Vision Statement Page.](#)



4

Click on "Strategic Objectives" from the [Plan Overview page.](#)



5

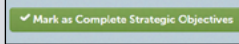
Paste in your vision descriptor underneath its correlating perspective. Refine the language if necessary.





6 Repeat steps 4-6 for each vision descriptor.

7 Once you're done, click the green "Mark as Complete" button to move on to Organization Goals.



Use the pre-populated labels:

1 Copy one of your vision descriptors from the [Vision Statement Page](#).



2 Click on "Strategic Objectives" from the [Plan Overview page](#).

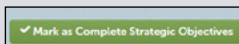


3 Paste in your vision descriptor underneath its correlating perspective. Refine the language if necessary.



4 Repeat steps 1-4 for each vision descriptor.

5 Once you're done, click the green "Mark as Complete" button to move on to Organization Goals.



Are these the biggest things your organization needs to focus on to reach its vision? **Do you have at least one for each perspective but no more than six total?** If yes, great work! You're done.

Organizations Goals: Set Annual SMART Goals

If your vision is a 3-5 year target and your strategic objectives are the big things you'll accomplish to achieve that vision, then organization goals are the milestones to reach along the way. To get started, create a list of results you'd like to see in the next year related to each of your strategic objectives. They might look something like:

- 150K in unrestricted grants and \$1M total funding
- Always have at least 90 days of cash on hand
- 25% of sales from outside of California and 15% growth in California



- Quality control process for our services
- Meaningful employee recognition program in place
- All departments know the “customer” they serve

Now that you have your list of results, we’re going to teach you how to turn these ideas into actionable goals.

Writing a Goal You Can Execute

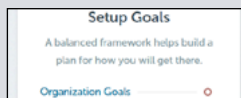
We could go on and on about [SMART goals](#) but what you need to know is simple — **If you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done by.** OnStrategy makes this easy.

Build Your Organization’s Goals

1 If you haven’t already done so, [set up your planning team.](#)

2 [Watch the Goal Cascade Video.](#)

3 Click on “Organization Goals” from the [Plan Overview page.](#)

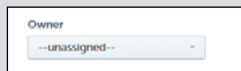


4 **Write a description of the goal:** You need to do something. Start with a verb and keep it simple.

Example: Win \$150k in unrestricted grants by the end of the year.



5 **Assign an owner:** Good Organization Goals are cross-functional (they require multiple teams and people to collaborate to achieve it), but a single person needs to be ultimately responsible for seeing it accomplished. Choose that person here.



6 **Set start and end dates:** You’re probably great at getting things done early but the rest of us need deadlines. For organization goals, the start and end dates usually correspond to your [set fiscal year.](#)





7

Set the measure and target:The measure is simply how you will track your progress on your goal.

If your goal is to increase revenue, the measure should be 'Revenue'. If your goal is to sell more widgets, the measure should be 'Widgets Sold'. The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

8

If this is a Key Performance Indicator, select yes. If not, leave it as no.

9

Develop at least 2 but no more than 4 corporate goals for each strategic objective.

What Does Good Look Like?

Here is an example of everything pulled together:

Step	Action	Who is Involved
1. Financial Success: Sustain our consistent 7.5% growth rate.	1.1 Win \$150k in unrestricted grants by the end of the year. (Amy)	\$150k \$'s in Unrestricted Grants Won
	1.2 Maintain our core funding of \$1M for 2016. (John)	\$1M Core Funding
	1.3 Manage expenses to maintain cash on hand equal to 90 days of operating expenses. (Jerry)	90 Days of Cash on Hand
2. Customer Focus: Raise awareness about our products outside of our local market.	2.1 Ship product to new customers outside of our local market in order to generate 25% of sales from out of state in 2016. (Stu)	25% % of Revenue from Out-of-State Sales
	2.2 Maintain our growth rate of 15% per year in our local market. (Jessica)	15% Local Market Growth Rate
3. Internal/Operational: Deliver our highest quality services consistently.	3.1 Implement quality control reviews at 3 points during all engagements to increase our 2016 satisfaction score to 80%. (Jenn)	80% Customer Satisfaction Score
4. People Expertise: Cultivate a customer-centric culture.	4.1 Recognize and reward 1 employee per month in 2016 who exhibits excellent customer service (to internal or external customers). (Al)	12 Employees Recognized
	4.2 Identify and define customer segments for 100% of departments. (Grace)	100% % of departments with identified customer segments



Expert Advice: 5 Keys to Creating Great Measures

- **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
- **Set measures you'll be able gather data on frequently:** Monthly at minimum, weekly is ideal.
- **One measure per goal, period:** If there are two measures, there are two goals.
- **The measure should be descriptive enough to stand on its own.** Bad Examples: Dollars, % Complete, Employees. Good Examples: 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
- **Clarify the data source for each measure with your team to ensure everyone is on the same page.**

Celebrate

You can celebrate when:

	Your Strategic Objectives and Organization Goals reflect your organization's most important priorities.
	You have a holistic plan framework consisting of between 4 and 6 strategic objectives.
	You have 2-3 specific Organization-Wide Goals for each Strategic Objective.
	Your measures and targets reflect the outcomes you're trying to achieve in the next year.
	All Organization-Wide Goals have an owner and start/end dates.
	You have identified 5-8 KPIs among your Organization Goals to help you assess progress quickly.



STEP 3 Identify Who Needs to do What

Track the Performance of Your Goals

Train Your Team to Develop Their Goals

Build Your Team-Level Goals

Now that you've architected a holistic structure for your plan that outlines your critical focus areas for this year, it's time to determine who actually needs to do what (and by when!) to cascade the plan. Pull your team in to structure the plan and develop a coordinated set of actions that will drive results.

Engaging your team in the plan development phase will instill a sense of ownership to drive accountability as you manage against the plan. We've developed a PowerPoint training deck to get your team proficient in developing and managing their own goals, getting them engaged while saving you time and energy.

You will be training your team on to how to:

1. Develop goals that your team can actually execute.
2. Manage performance of those goals.

Track the Performance of Your Goals

Before you train your team, you need to understand how the Track Performance features of OnStrategy work. Here's how to track the performance of goals within the platform:

1

[Watch this video](#) to understand how the Track Performance section works.

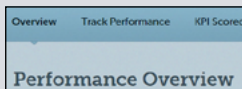
2

[Click on "Performance" in the top-level navigation.](#)



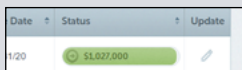
3

[Click on Track Performance.](#) If you're the Strategy Leader, this will show you all of the goals that are in the system. Team members will see just those goals that they've been assigned to and those in alignment with their goals.



4

Click the pencil icon next to a goal to update it.





5 Select the “Status” of your goal in the upper right-hand corner of the goal update page: These options include Achieved, Deferred, On Target, Off Target, Waiting on Someone, and Critical.

A dropdown menu titled 'Status' with a green checkmark icon and the text 'On Target' selected.

6 Enter the actual performance of the goal for a given time period in the “Actuals” column: These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.

A table with columns for 'Actuals' and 'Targets' showing performance data over time.

7 If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.

A text input field titled 'Comments on Status' containing the text: '12/15 Missed sales target this month due in large part to being closed for weather. A lot of expenses.'

8 Click “Save and Continue.”

Three buttons: 'Save & Continue' (green), 'Save' (blue), and 'Cancel' (grey).

Want to track the performance of goals even faster? Use OnStrategy Mobile.

1 [Download OnStrategy Mobile using the text to download feature.](#)

2 Login using your credentials.

3 Click on “Flagged” to see goals that need an update.

A dropdown menu titled 'My Goals' with 'Supporting Goals' and 'Flagged (5)' options.

4 Click on any goal you would like to update to open the goal card.

5 Click on the “Results” section to update your performance actual.

A section titled 'RESULTS FOR MONTH NOVEMBER '15 (LAST UPDATED 11/23/15)' with a percentage input field.

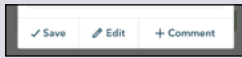
6 Select the current “Status” of the goal.

A dropdown menu titled 'STATUS' with 'On Target' selected.



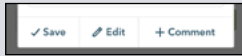
7

Click “Comment” to add a comment: Always start a comment with the date and your initials. The most recent comments should be on the top.



8

Click “Save” to save the update.



Now that you have a solid understanding how to track performance of the goals you created, it’s time to train your team.

Train Your Team to Develop Their Goals

1

Schedule a 90-minute training session and invite anyone who will be responsible for executing against the plan.

[The OnStrategy Team Training Presentation](#) is separated into two sections – Plan and Performance. You can deliver both sections in one training session, or you may elect to break it out into two sessions. This should depend on how much guidance your team needs on developing goals.

2

Communicate the purpose of your meeting and set the expectation that it is mandatory. To help, we’ve drafted a message you can use below:

“Hi Team-

As we’ve completed the development of our Strategic Plan, it’s time to move it into action!

We’ll be using a platform called OnStrategy to help us manage our performance against the plan. OnStrategy will help make the management process much simpler and easier for all of you so that we can sustain the focus that we’ve created through the planning process.

I’ll be sending a meeting invitation for training on the OnStrategy platform. I ask that you all make it a priority to attend.”

3

Lead and record the 90-minute training session [using this PowerPoint](#).

4

Login to the platform to use in tandem with the PowerPoint so you can show your team how the system works specifically with your plan.

5

Use the notes section in the PowerPoint to make sure you hit all of the necessary points.

6

Set Expectations: Tell your team the next steps are for each to build out at least 3-5 goals within the next 5 days. Have a clear due date for team member goals being completed!



7

Send your team a [Welcome Email](#), a customizable communication that you can send directly from in the platform. This will supply them with a link to OnStrategy and their login credentials. Include a reminder date for when you expect their goals to be completed.

8

Send out this [Cheat Sheet handout](#) and inform your team that the "More Info" tab in the system is a helpful resource moving forward.

Celebrate

You can celebrate when:



Everyone on your team has at least 3 goals and no more than 7.



Each member of your team has downloaded the mobile app.



Everyone has at least tracked the performance of one item.

Celebrate! Your team is ready to roll in using the OnStrategy platform for both plan development and execution!



STEP 4 Hold Your Team Accountable

Improve your Weekly Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard

Manage Performance

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you've put in up until this point will lose value if you don't get right into strategy management to sustain the organizational focus that you've worked so hard to create. This is about maintaining that momentum. To get a solid understanding of what good strategy implementation should look like, [check out this video](#).

There are a lot of nuances to effectively managing against your strategy based on your organization's culture and the people involved in the process. But, we've identified a number of proven best practices to ensure your team can sustain the focus they gained through the planning process and execute against the plan to drive results.

The Types of Meetings You Need for Successful Implementation

Facilitating Strategy Review Meetings can be difficult. To prepare, keep in mind the purpose of the meeting and how it differs from other meetings. Below is a list of the different meeting types and their purposes:

Meeting Type	Time Required	Attendees	Purpose/Format
Weekly Tactical	60 mins	Operations Team	Share weekly priorities, activities and resolve any runaway issues. Focus is next 5-10 days.
Monthly Strategy Review	90 mins	Executive Team + Department Heads	Review the performance of the organization, decide critical issues affecting long-term success.
Quarterly Deep Dive	2-3 hours	Executive Team	Deep dive into critical issues, brainstorming & problem solving.

We don't want to spend too much time here, because this is likely something you're already doing. Instead, note the tips below for turning your weekly meeting into something that's more impactful.

Improve Your Weekly Meetings

- 1 Stay consistent and have your meeting on the same day and at the same time each week.**
- 2 Require attendance:** Vacation and client work should be the only exceptions for missing this meeting. All attendees are supposed to attend and participate in each and every meeting.
- 3 Rotate the meeting host to keep your team on their feet!**
- 4 Respect everyone's time by starting and ending the meeting at the same time each week.**
- 5 Dial the structure and aim to leave it unchanged.**



Monthly and Quarterly Strategy Reviews

Having a Monthly Strategy Review meeting is arguably the most critical factor so your plan stays agile and relevant to keep your team focused. The purpose of this meeting should be to report out on progress against the plan, make changes to the plan, and establish the strategic focus for the next 30 days. If you're not doing this, the focus you created during the planning phase will be lost. For more detail on how to do a great job leading a Monthly Strategy Review Meeting, For more detail on how to do a great job leading a Monthly Strategy Review Meeting, [check out this video](#).

Preparing for Your Strategy Review

- 1 Send automated alerts from the "[Notifications](#)" section of the platform, OR a personalized communication to all people that will be attending the meeting.
- 2 Have your team update the progress of their goals at least 5 days before your Strategy Review Meeting.
- 3 Check in on the progress updates of your team at least 3 days before your Strategy Review Meeting and send an individual email to all people who have not updated their progress.
- 4 Review the plan and check all progress updates to assess what's happening from a performance perspective. Make notes accordingly.
- 5 Use the filter on the [Track Performance](#) page to look at end dates that are approaching and note any imminent end dates.
- 6 Use this [Leader's Agenda](#) template to build an agenda and collect all of your comments and insights from above.
- 7 Use this [sample agenda](#) as a basis to develop an agenda 1-2 days before your Strategy Review Meeting. [Refer to this video](#) to learn more about two meeting models (functional vs. thematic).
- 8 In your agenda, provide a report-out structure so people know what you expect from them. For each goal, example report outs might be:
 - *Comment on the performance of the 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?*
- 9 Set aside a time in your agenda for any special topics: This will ensure that important topics don't get overlooked, but also don't override the meeting.
- 10 Send an email to the planning team with the agenda in the body.



Customize Your Dashboard

1

[Click on the "Dashboard" in the top level navigation.](#)



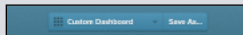
2

Select the "Filter" feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



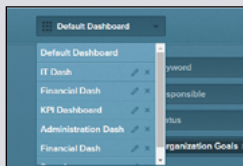
3

Once you've filtered out these goals, click "Save As."



4

Check the filter after saving using the dropdown menu on the left.



5

Repeat these steps for every high-level item on your agenda.

Expert Advice: Synchronize Your Agenda and Dashboard

As with the agenda flow discussed in this section of the OS Playbook, think about creating dashboards that align to your Monthly Strategy Review Agenda, and are thematic in nature.

As an example if you're using the Balanced Scorecard to build your plan, you have distinct sections for Financial, Customer, Internal/Operational, People & Learning. But, you certainly don't want to facilitate your Monthly Strategy Review Meeting in that order. Instead, consider the following steps to developing more impactful dashboards and more powerful conversations:

- Pair your top-line revenue goals with the leading indicator metrics from your Customer section.
- Pair your bottom-line earnings goals with the leading indicator metrics from your Internal/Operational section.
- Consider the many levels within your People section. Although the aggregations are important, it's exciting to see what people are accomplishing at a team and individual level. Consider drilling deeper.

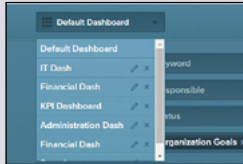


Running Your Strategy Review

1 Follow the agenda that you've created in the above section.

2 [Facilitate the conversation using the Dashboard.](#)

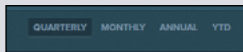
- Select the "Filter" feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



- As your team reports on the progress of the supporting goals, navigate through the Dashboard to pull up each chip representing the goal they're speaking to.



- Toggle between the Weekly, Monthly, and Annual views for a dynamic display of the goal you're discussing.



3 Have someone take notes on goal performance within the agenda structure.

4 Always use the same conference number and/or screen share to keep the logistics simple.

Strategy Review Follow Up:

1 Send a follow-up communication to your team that includes full meeting notes in the body of the email and any follow-up communication or topics that need to be addressed post meeting.

2 Make necessary adjustments to the plan.

Expert Advice: Managing the Strategy Review Process

- Time the meetings late enough in the month to allow for the financials from the previous month to be complete.
- You need the executive team in the meeting, but you may also pull in others who have valuable insight into business operations: Keep in mind this could be a great professional development opportunity for people on your team!



- **To the extent that you can get everyone in the same room, do so.** This isn't mission-critical, though. Better to have the right people on and have a remote meeting than not having the right people.
- **This meeting is for reviewing the performance, not problem solving.** Take things off-line and avoid any temptation to go down rabbit trail conversations.

Celebrate

You can celebrate when:



You have scheduled out the next 6 monthly strategy reviews.



Everyone on your team has reported on the progress of all items at least once.



You have run at least one monthly strategy review.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your organization – make sure it stays that way!



OnStrategy

MANAGER ROLE

This section is for anyone leading a team. That means VPs, directors, managers, supervisors or any other title that your organization might use for a team lead designation.



OnStrategy Playbook: Manager Role

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STEP 1 See What Success Looks Like

Read the Plan and Identify Where Your Team Aligns



STEP 2 Determine What's Most Important Right Now

Build Your Manager Goals

Train Your Team to Develop Their Goals



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals



STEP 4 Hold Your Team Accountable

Improve Your Weekly Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard

Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the OnStrategy application is a dynamic, one-page strategic plan that communicates to everyone in your organization what the strategic focus is and how the organization is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The below image shows you what a completed, active plan will look like when you are done.

The playbook walks you through how to build and manage a plan that looks like this – in just 4 steps.

Step 1: See What Success Looks Like

Step 2 & 3: Determine What’s Important Now and Get Noticed for Your Results

Step 4: Hold Your Team Accountable

The screenshot displays the OnStrategy application interface for Acme Corporation. The top navigation bar includes 'Plan', 'Performance', 'Reports', and 'Dashboard', along with a user profile for Russell P. The main content area is organized into several sections:

- Get the Most out of:** A call to action for 'THE ONSTRATEGY PLAYBOOK'.
- Mission:** A statement of purpose: 'Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.'
- Vision:** A statement of aspiration: 'We envision being THE technology experts and resource center for small and medium-sized organizations.'
- Core Values:** A list of values including Professionalism, Client Focus, Integrity, and Leadership.
- Strategic Objectives:** A central dashboard showing overall performance (60% on strategy) and a table of organization goals.

Organization Goals	YTD Target	YTD Variance	Actual
1.1 1.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.2 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.3 1.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188
- Next Steps:** A section for 'Manage Performance' with motivational messages like 'Keep your team motivated and inspired' and 'Congratulate achievers!'.
- Strategy Expert:** A call to action for 'Zach, your strategy expert is just a click away' with contact information.
- My Focus:** A section for 'Flagged (3)' items, including 'Professional Consulting: Generate \$700,000 in web design consulting' (\$313k) and 'Generate \$300,000 from added software features by the end of each FY.' (\$262k).
- Recent Reports:** A list of reports such as 'Full Strategic Plan w/Progress' and 'Strategy Review PowerPoint'.
- Last Login:** A table showing team members and their last login dates.

Team Member	Last Login
Shelby Cuellar	11/21/15
Jacob Sharkey	11/20/15
Christopher Pechacek	10/19/15

At the bottom, three red-bordered boxes are labeled 'Step 1', 'Step 2-3', and 'Step 4', corresponding to the sections above.

Introduction

Welcome to OnStrategy! Ready to drive organizational focus, create clarity, and align your team? This resource is for you. We've built the OnStrategy Playbook from a collection of our best thinking from working with thousands of organizations from around the globe to create and execute great strategy. It's more than just a user guide – it's a step-by-step guide of the core essentials you need to deploy a management system focused on your organization's strategy.

The OnStrategy Playbook: Manager Role

The OnStrategy Playbook has specific sections for each organizational role. This section is for anyone leading a team. That means VPs, directors, managers, supervisors or any other title that your organization might use for a team lead designation. For simplicity purposes, we'll use "manager" throughout this guide.

This Toolkit's Intended Outcome:

- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the OnStrategy platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have 3-5 goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Management Meetings:** Learn how to refine your existing senior team meetings to be driven by your strategic goal performance metrics.
- **Results:** Start seeing business results by focusing on what matters most and aligning your team to a unified direction.



STEP 1 See What Success Looks Like






Read the Plan and Identify Where Your Team Aligns

As a VP, director or team leader within your organization, you have two main roles in completing the development of an executable strategic plan:

1. **You must identify and align your team's priorities where they will have the most impact in helping your organization achieve its overall goals.** NOTE: Your team goals are your goals as a manager – we use these terms interchangeably.
2. **You must also work with your team members to create individual goals and action items that support your team goals.** Be clear on who needs to do what and by when.

To achieve the above two tasks, your organization must have a holistic plan framework of Strategic Objectives and Organization Goals already in place. To review what is currently in place for your organization, **go to the Organization Goals page.**

You should see:

	A holistic set of 4-6 strategic objectives that reflect your organization's most important priorities.
	2-3 SMART Organization-Wide Goals for each Strategic Objective.
	Measures and targets for the Organization-Wide Goals that reflect the outcomes you're trying to achieve in the next year.
	Owners for each goal.
	Start and End Dates for all Organization-Wide Goals.

These items are the foundation of any good plan. If your plan's foundation doesn't meet all of the criteria listed above, you are not ready to build upon it and you should contact your strategy leader.

Aligning Your Team Goals

A foundational element in any strategic plan is clear alignment throughout an organization. The OnStrategy platform accomplishes this through the concept of Goal Cascading. This is simply taking the big idea, like a Strategic Objective, and breaking it down into smaller, more manageable pieces according to the accountability structure within your organization. Below is a visual example of what this looks like in practice:



Read the Plan and Identify Where Your Team Aligns

- 1

Print the Executive Summary Report from the [Reports page](#).

<p>Plan Reports</p> <ul style="list-style-type: none"> Executive Plan Business Plan Strategic Plan Marketing Plan Financial Plan Operational Plan Human Resources Plan Information Technology Plan Legal Plan Risk Management Plan Environmental Plan Quality Management Plan Health, Safety and Environment Plan Other 	<p>Performance Reports</p> <ul style="list-style-type: none"> Annual Report Quarterly Report Monthly Report Weekly Report Daily Report Project Report Task Report Team Report Department Report Division Report Company Report Industry Report Market Report Competitor Report Customer Report Supplier Report Partner Report Investor Report Analyst Report Regulator Report Other
--	---
- 2

In the Detail section of this report, you will see your organization’s Strategic Objectives and Organization-Wide Goals. Read through these and highlight the Organization-Wide Goals your team directly supports.

Celebrate

You can celebrate when:

- ✓

You have a good understanding of your organization’s overall strategy and it makes sense!
- ✓

You see how your work supports the strategy of the organization.

If you can check all the boxes above, Celebrate! You’re now ready for the next step of building your manager goals.



STEP 2 Determine What's Most Important Right Now

Build Your Manager Goals

Train Your Team to Develop Their Goals

Set Your Manager Goals

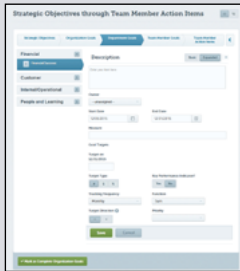
Once you've identified where your team fits in to the organizations' strategy, it's time to identify how by creating your team's goals. We could go on and on about SMART goals but what you need to know is simple – if you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done by. OnStrategy makes this easy.

Build Your Manager Goals

Here is the step-by-step guide for building your manager goals:

1 [Watch the Goal Cascade Video.](#)

2 Click on "Department Goals" from the [Organization Goals page.](#)



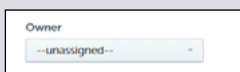
3 Click on the first goal you highlighted on the Executive Summary Report on the left-hand side of this page.

4 **Write a description of the goal:** 4. Describe what your team needs to do to support the organization goal.

Example: Win \$150k in unrestricted grants by the end of the year.



5 **Assign an owner:** This will be you. As the team leader, you're ultimately responsible for your team's performance. We'll talk about how to delegate individual goals and actions later.





6

Set start and end dates: For your manager goals, the start and end dates usually correspond to your [set fiscal year](#).

Start Date	End Date
12/31/2015	12/31/2015

7

Set the [measure](#) and target: The measure is simply how you will track your progress on your goal.

If your goal is to increase revenue, the measure should be 'Revenue'. If your goal is to sell more widgets, the measure should be 'Widgets Sold'. The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

Start Date	End Date
12/31/2015	12/31/2015
Measure	
Goal Targets	
Target on	12/31/2015

8

If this is a [Key Performance Indicator](#), select yes. If not, leave it as no.

Key Performance Indicator?
<input type="button" value="Yes"/> <input type="button" value="No"/>

9

Develop at least 3 but no more than 7 manager goals for yourself. More than 7 is too many for any team to focus on.

Expert Advice: 5 Keys to Creating Great Measures

1. **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
2. **Set measures you'll be able to gather data on frequently:** Monthly at minimum, weekly is ideal.
3. **One measure per goal, period:** If there are two measures, there are two goals.
4. **The measure should be descriptive enough to stand on its own.** Bad Examples: Dollars, % Complete, Employees. Good Examples: 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
5. **Clarify the data source for each measure with your team to ensure everyone is on the same page.**

Help Your Team Build Goals

Now that you've architected a holistic structure for your plan that outlines your critical focus areas for this year, it's time to determine who actually needs to do what (and by when!) to cascade the plan. Pull your team in to structure the plan and develop a coordinated set of actions to drive results.

Engaging your team in the plan development phase will instill a sense of ownership to drive accountability as you manage against the plan. We've developed a PowerPoint training deck to get your team proficient in developing and managing their own goals, getting them engaged while saving you time and energy.



Train Your Team to Develop Their Goals

1 Schedule a 60-minute training session and invite anyone on your team who will be responsible for executing against your manager goals.

[The OnStrategy Team Training Presentation](#) is separated into two sections – Plan and Performance. You can deliver both sections in one training session, or you may elect to break it out into two sessions. This should depend on how much guidance your team needs on developing goals.

2 Communicate the purpose of your meeting and set the expectation that it is mandatory. To help, we've drafted a message you can use below:

"Hi Team-

As we've completed the development of our Strategic Plan, it's time to move it into action!

We'll be using a platform called OnStrategy to help us manage our performance against the plan. OnStrategy will help make the management process much simpler and easier for all of you so that we can sustain the focus that we've created through the planning process.

I'll be sending a meeting invitation for training on the OnStrategy platform. I ask that you all make it a priority to attend."

3 Lead and record the 90-minute training session [using this PowerPoint](#). Be sure to record it for future reference.

4 Login to the platform to use in tandem with the PowerPoint so you can show your team how the system works specifically with your plan.

5 Use the notes section in the PowerPoint to make sure you hit all of the necessary points.

6 **Set Expectations:** Tell your team the next steps are for each to build out at least 3-5 goals within the next 5 days. Have a clear due date for team member goals being completed!

7 Ask your strategy leader to send your team a **Welcome Email**, a customizable communication that you can send directly from in the platform. This will supply them with a link to OnStrategy and their login credentials. Include a reminder date for when you expect their goals to be completed.

8 Send out this [Cheat Sheet handout](#) and inform your team that the "More Info" tab in the system is a helpful resource moving forward.

9 Review your team members' goals to ensure all items meet the SMART guidelines and are holistically the right set of priorities for everyone to focus on.



Celebrate

You can celebrate when:



You have developed and own between 3-7 SMART goals.



Your measures and targets reflect the outcomes you're trying to achieve with your team in the next year.



You have identified 3-5 KPIs among your manager goals to help you assess progress quickly.



Everyone on your team has at least 3 goals but no more than 7.



All goals have an owner and start/end dates.



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals

Moving Into Execution

Now that your plan is completed, you are ready to move into execution. At OnStrategy, we think doing the hard work of execution is more important than spending time writing performance reports or sitting in report-out meetings. We created a simple interface for every team member to quickly and easily report on performance – weekly is ideal, monthly is sufficient. In fact, if it takes each team member more than 15 minutes per month, it's too long. The OnStrategy platform acts as the "air traffic control tower" of your management system. With every team member reporting in, you'll know where to focus, adjust and modify to stay on strategy.

Track the Performance of Your Goals

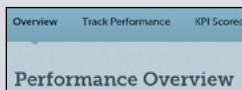
Here's how to track the performance of goals within the platform:

1 [Watch this video](#) to understand how the Track Performance section works.

2 [Click on "Performance" in the top-level navigation.](#)



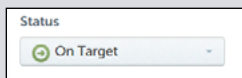
3 [Click on Track Performance.](#) As a manager, you'll see all the goals assigned to you and all of the goals assigned to your team that support your performance. Team members will see just those goals that they've been assigned to and those in alignment with their goals..



4 [Click the pencil icon next to a goal to update it.](#)



5 [Select the "Status" of your goal in the upper right-hand corner of the goal update page:](#) These options include Achieved, Deferred, On Target, Off target, Waiting on Someone, and Critical.





6

Enter the actual performance of the goal for a given time period in the “Actuals” column: These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.



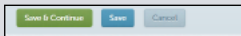
7

If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.



8

Click “Save and Continue.”



Want to track the performance of goals even faster? Use OnStrategy Mobile.

1

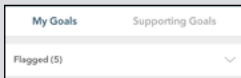
[Download OnStrategy Mobile using the text to download feature.](#)

2

Login using your credentials.

3

Click on “Flagged” to see goals that need an update.



4

Click on any goal you would like to update to open the goal card.

5

Click on the “Results” section to update your performance actual.



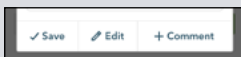
6

Select the current “Status” of the goal.



7

Click “Comment” to add a comment: Always start a comment with the date and your initials. The most recent comments should be on the top.



8

Click “Save” to save the update.





Celebrate

You can celebrate when:



You've downloaded the mobile application.



You have tracked the performance of at least one of your goals.



Everyone on your team has updated the progress of at least one goal.



Everyone on your team has downloaded the mobile application.



STEP 4 Hold Your Team Accountable

Improve Your Weekly Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard

Use the Dashboard to Transform Your Weekly Meetings

“Without execution, vision is just another word for hallucination.” – Mark Hurd - Hewlett-Packard CEO

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you’ve put in up until this point will lose value if you don’t get right into strategy management to sustain the organizational focus that you’ve worked so hard to create. This is about maintaining that momentum. To get a solid understanding of what good strategy implementation should look like, [check out this video](#).

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Customize Your Dashboard

1

[Click on the "Dashboard" in the top level navigation.](#)



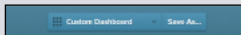
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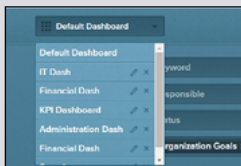
3

Once you've filtered out these goals, click "Save As."



4

Check the filter after saving using the dropdown menu on the left.



5

Repeat these steps for every high-level item on your agenda.

Expert Advice: Synchronize Your Agenda and Dashboard

As with the agenda flow discussed in this section of the OS Playbook, think about creating dashboards that align to your Monthly Strategy Review Agenda, and are thematic in nature.

As an example if you're using the Balanced Scorecard to build your plan, you have distinct sections for Financial, Customer, Internal/Operational, People & Learning. But, you certainly don't want to facilitate your Monthly Strategy Review Meeting in that order. Instead, consider the following steps to developing more impactful dashboards and more powerful conversations:

- Pair your top-line revenue goals with the leading indicator metrics from your Customer section.
- Pair your bottom-line earnings goals with the leading indicator metrics from your Internal/Operational section.
- Consider the many levels within your People section. Although the aggregations are important, it's exciting to see what people are accomplishing at a team and individual level. Consider drilling deeper.

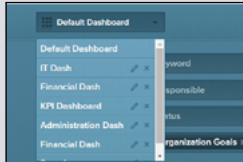


Running Your Strategy Reviews

1 Follow the agenda that you've created in the above section.

2 [Facilitate the conversation using the Dashboard.](#)

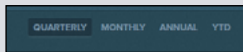
- Select the "Filter" feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



- As your team reports on the progress of the supporting goals, navigate through the Dashboard to pull up each chip representing the goal they're speaking to.



- Toggle between the Weekly, Monthly, and Annual views for a dynamic display of the goal you're discussing.



4 Have someone take notes on goal performance within the agenda structure.

5 Keep the conversation moving. "Park" any topics that start to go deep into problem solving as these should be discussed later.

6 Always use the same conference number and/or screen share to keep the logistics simple.

Strategy Review Follow Up:

1 Send a follow-up communication to your team that includes full meeting notes in the body of the email and any follow-up communication or topics that need to be addressed post meeting.

2 Make necessary adjustments to the plan.



Expert Advice: Managing the Strategy Review Process

- **As a manager, you LEAD your own reviews and PARTICIPATE in the executive team Strategy Reviews.** Therefore, your strategy leader will be following these same steps in preparation for the corporate review.
- **To the extent that you can get everyone in the same room, do so.** This isn't mission-critical, though. Better to have the right people on and have a remote meeting than not having the right people.
- **This meeting is for reviewing the performance, not problem solving.** Take things off-line and avoid any temptation to go down rabbit trail conversations.

Celebrate

You can celebrate when:



Everyone on your team has reported on the progress of all items at least once.



You have run at least one monthly strategy review.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your organization – make sure it stays that way!



OnStrategy

TEAM MEMBER ROLE

This section is for individual contributors helping an organization realize its strategic potential by executing against their team's goals and actions.



OnStrategy Playbook: Team Member Role

This section is for individual contributors helping an organization realize its strategic potential by executing against their team's goals and actions.



STEP 1 See What Success Looks Like

Read the Plan and Identify Where You Align



STEP 2 Determine What's Most Important Right Now

Build Your Individual Goals



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals



STEP 4 Stay Connected to Your Team's Performance

Get Prepared for a Strategy Review

Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the OnStrategy application is a dynamic, one-page strategic plan that communicates to everyone in your organization what the strategic focus is and how the organization is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The below image shows you what a completed, active plan will look like when you are done.

The playbook walks you through how to build and manage a plan that looks like this – in just 4 steps.

Step 1: See What Success Looks Like

Step 2 & 3: Determine What’s Most Important Now and Get Noticed for Your Results

Step 4: Stay Connected to Your Team’s Performance

Acme Corporation
Powered by MyStrategicPlan

Plan Performance Reports Dashboard Russell P.

MANAGE CARDS

Get the Most out of

THE ONSTRATEGY PLAYBOOK
SEE WHAT A GOOD PLAN LOOKS LIKE

Mission

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

Vision

We envision being THE technology experts and resource center for small and medium-sized organizations.

Core Values

Core Values:

- Professionalism - to be professional in our actions to our clients, partners and each other.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.

Strategic Objectives 60% 30 16 7 19

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year. **50% On Strategy** 9 9 3

Organization Goals	YTD Target	YTD Variance	Actual
1.1 1.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.2 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.3 1.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188

2. Customer Success – Professional Services: To be the professional partner of choice. **52% On Strategy** 6 3 3 9

3. Customer Success – Maintenance Contracts: To be viewed as the top technology resource in the western region. **73% On Strategy** 7 7

4. Internal/Ops – Innovation/Product Development: Continue to develop technology innovation. **64% On Strategy** 8 4 4

Next Steps

Manage Performance

Keep your team motivated and inspired

- ✓ Congratulate achievers!
- ✓ Nudge those falling behind

Strategy Expert

Zach, your strategy expert is just a click away

CALL: 775 747 7404 EMAIL

My Focus

Flagged (3)

1.1.1 Professional Consulting: Generate \$700,000 in web design consulting **\$313k**

1.1.3 Generate \$300,000 from added software features by the end of each FY. **\$262k**

2.3.3 Develop 2 new webinars a quarter to assist the sales team. **1**

Active (12)

Recent Reports

Full Strategic Plan w/Progress 12/11/15

Strategy Review PowerPoint 11/21/15

Action Plan 11/20/15

Last Login

Shelby Cuellar 11/21/15

Jacob Sharkey 11/20/15

Christopher Pechacek 10/19/15

Step 1

Step 2-3

Step 4

Introduction

Welcome to OnStrategy! Ready to drive organizational focus, create clarity, and align your team? This resource is for you. We've built the OnStrategy Essentials Guide from a collection of our best thinking from working with thousands of organizations from around the globe to create and execute great strategy. It's more than just a user guide – it's a step-by-step guide of the core essentials you need to deploy a management system focused on your organization's strategy.

The OnStrategy Playbook: Individual Contributor Role

The OnStrategy Playbook has specific sections for each organizational role. This section is for individual contributors. For simplicity purposes, we'll use "team member" throughout this guide

This Toolkit's Intended Outcome:

- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the OnStrategy platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have 3-5 goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Management Meetings:** Learn how to refine your existing senior team meetings to be driven by your strategic goal performance metrics.
- **Results:** Start seeing business results by focusing on what matters most and aligning your team to a unified direction.



STEP 1 See What Success Looks Like

Read the Plan and Identify Where You Align

As an individual contributor, your role in completing the development of an executable strategic plan is to create individual goals and action items that clarify what you are doing and by when.

To achieve the above task, your organization must have a holistic plan framework of Strategic Objectives, Organization Goals, and Manager Goals* in place. To review what is currently in place for your organization, To review what is currently in place for your organization, [click here](#).

**Manager goals are only applicable to multi-team accounts. If you only see 4 plan levels on the [Goal Setting page](#), you are in a single-team account and you ignore references to Manager Goals throughout this guide.

You should see:

- ✓ **A holistic set of 4-6 strategic objectives that reflect your organization's most important priorities.**
- ✓ **2-3 SMART Organization-Wide Goals for each Strategic Objective.**
- ✓ **Measures and targets for the Organization-Wide Goals that reflect the outcomes your organization is trying to achieve in the next year.**
- ✓ **3-5 Manager Goals that set the priorities for your team and illustrate what part of the corporate goals you are responsible for.**

These items are the foundation of any good plan. If your plan's foundation doesn't meet all of the criteria listed above, you are not ready to build upon it and you should contact your strategy leader.

Aligning Your Goals

A fundamental component of OnStrategy is ensuring clear alignment throughout an organization. The system accomplishes this through the concept of Goal Cascading. This is simply the idea of taking a big idea, like a Strategic Objective, and breaking it down into smaller, more manageable pieces according to the accountability structure within your organization. Below is a visual example of what this looks like in practice.





Read the Plan and Identify Where You Align

1

Print the Executive Summary Report from the [Reports Page](#).

Plan Reports	Performance Reports
<ul style="list-style-type: none">Executive Summary ReportStrategic Objectives ReportOrganization Goals ReportManager Goals ReportStrategic Initiatives ReportStrategic Objectives ReportOrganization Goals ReportManager Goals ReportStrategic Initiatives Report	<ul style="list-style-type: none">Executive Summary ReportStrategic Objectives ReportOrganization Goals ReportManager Goals ReportStrategic Initiatives ReportStrategic Objectives ReportOrganization Goals ReportManager Goals ReportStrategic Initiatives Report

2

In the “Detail” section of this report, you will see your organization’s **Strategic Objectives, Organization Goals and Manager Goals**. Read through these and highlight the Manager Goals you directly support.

You may support Manager Goals that don’t belong to your direct supervisor. Cross-functional collaboration is a necessary component of successful strategy implementation, so be on the lookout for other Manager Goals you may need to support.

Celebrate

You can celebrate when:



You have a good understanding of your organization’s overall strategy and it makes sense!



You see how your work supports the strategy of the organization.



You have highlighted 3-7 Manager Goals that you directly contribute to.

If you can check all the boxes above, Celebrate! You’re now ready for the next step of building your individual goals



STEP 2 Determine What's Most Important Right Now

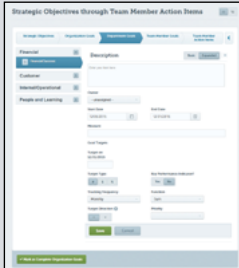
Build Your Individual Goals

Once you've identified **where** you fit in to the organization's strategy, it's time to identify **how** by creating your individual goals. We could go on and on about SMART goals but what you need to know is simple- **If you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done by.** OnStrategy makes this easy.

Build Your Individual Goals

1 [Watch the Goal Cascade Video.](#)

2 Click on "Team Member Goals" from the [Organization Goals](#) page.



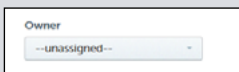
3 Click on the first Manager Goal you highlighted on the Executive Summary Report on the left-hand side of this page.

4 Describe what you need to do to support the Manager Goal.

Example: Win \$150k in unrestricted grants by the end of the year.



5 **Assign an owner:** This will be you. First select your team/manager from the drop-down menu. In the second drop-down menu, select your name..



6 **Set start and end dates:** Use the start and end date to signal when the goal will begin and when it will end. If the goal is ongoing, the start and end dates usually correspond to your [set fiscal year](#).





7

Set the [measure](#) and target The measure is simply how you will track your progress on your goal.

If your goal is to increase revenue, the measure should be 'Revenue'. If your goal is to sell more widgets, the measure should be 'Widgets Sold'. The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

8

If this is a [Key Performance Indicator](#), select yes. If not, leave it as no.

9

Develop at least 3 but no more than 7 goals for yourself. More than 7 is too many for any individual to focus on.

Expert Advice: 5 Keys to Creating Great Measures

1. **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
2. **Set measures you'll be able gather data on frequently:** Monthly at minimum, weekly is ideal.
3. **One measure per goal, period:** If there are two measures, there are two goals.
4. **The measure should be descriptive enough to stand on its own.** Bad Examples: Dollars, % Complete, Employees. Good Examples: 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
5. **Clarify the data source for each measure with your team to ensure everyone is on the same page.**

Celebrate

You can celebrate when:



You have developed and own between 3-7 SMART goals.



Your measures and targets reflect the outcomes you're trying to achieve in the next year.



Your goals are assigned to you and they have start and end dates.



You have identified 2-3 KPIs among your goals to help you assess progress quickly.



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals

Manage the Performance of Your Goals

Now that your plan is completed, you are ready to move into execution. At OnStrategy, we think doing the hard work of execution is more important than spending time writing performance reports or sitting in report-out meetings. We created a simple interface to allow you to quickly and easily report on your performance – weekly is ideal, monthly is sufficient.

In fact, if it takes you more than 15 minutes per month to update your goal's performance, it's too long. The OnStrategy platform acts as the "air traffic control tower" of your management system. With every team member reporting in, your manager will know where to focus, adjust, and modify to stay on strategy.

Track the Performance of Your Goals

Here's how to track the performance of goals within the platform:

1

[Watch this video](#) to understand how the Track Performance section works.

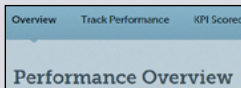
2

[Click on "Performance" in the top-level navigation.](#)



3

[Click on Track Performance.](#) Team members will see just those goals that they've been assigned to and those in alignment with their goals.



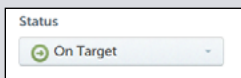
4

[Click the pencil icon next to a goal to update it.](#)



5

[Select the "Status" of your goal in the upper right-hand corner of the goal update page:](#) These options include Achieved, Deferred, On Target, Off Target, Waiting on Someone, and Critical.





6

Enter the actual performance of the goal for a given time period in the “Actuals” column: These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.



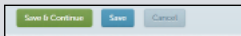
7

If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.



8

Click “Save and Continue.”



Want to track the performance of goals even faster? Use OnStrategy Mobile.

1

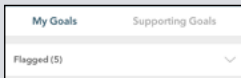
[Download OnStrategy Mobile using the text to download feature.](#)

2

Login using your credentials.

3

Click on “Flagged” to see goals that need an update.



4

Click on any goal you would like to update to open the goal card.

5

Click on the “Results” section to update your performance actual.



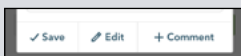
6

Select the current “Status” of the goal.



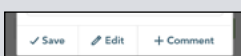
7

Click “Comment” to add a comment: Always start a comment with the date and your initials. The most recent comments should be on the top.



8

Click “Save” to save the update.





Celebrate

You can celebrate when:



You understand a good status report includes an update of actual performance, current status of the goal, and a one-line comment to provide context.



You've downloaded the mobile app.



You've tracked the performance of every item assigned to you.



STEP 4 Stay Connected With Your Team's Performance

Get Prepared for a Strategy Review

Being Prepared for a Strategy Review

"Without execution, vision is just another word for hallucination." – Mark Hurd - Hewlett-Packard CEO

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you've put in up until this point will lose value if you don't get right into strategy management to sustain the organizational focus that you've worked so hard to create. This is about maintaining that momentum. To get a solid understanding of what good strategy implementation should look like, [check out this video](#).

Get Prepared for a Strategy Review

- 1** Update the performance of all goals you own 5 days before your Strategy Review. See the previous section for instructions on how to complete a progress update.
- 2** Review the performance of any items that support your goals.
- 3** Review the agenda provided by your manager.
- 4** Prepare your report-out for each goal. An example report-out for each goal is as follows Remember, a good report-out is succinct and less than 2 mins. An example report-out for each goal is as follows.
 - *Comment on the performance of the 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?*

Celebrate

You can celebrate when:



You successfully reported on the progress of all items at least once.



You participated in at least one monthly strategy review.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your organization – make sure it stays that way!