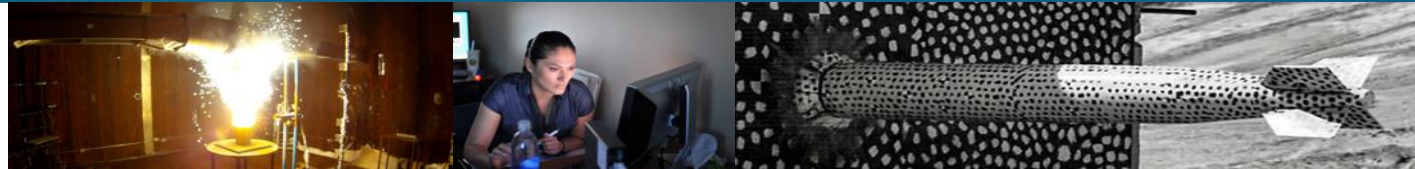


Effective Strategy Deployment to Realize Results



Presented by Marlena Taylor

March 16, 2023



For more
info



Agenda

- Strategy implementation challenges
- Tools and approaches to overcome strategy implementation challenges
- Where to learn more

Expected Outcomes

- Share common strategy implementation challenges and a handful of tools and approaches to address them
- Create a learning platform to equip you to immediately apply a tool or approach to enable you to mature your organization's ability to achieve its goals and objectives.



67% of well-formulated strategies failed due to poor execution. (HBR)

The 6 Most Acknowledged Strategy Implementation Challenges



According to Forbes

01

Ineffective Performance Management

Problems such as unclear or missing objectives and targets, wrong use of measures and performance indicators (KPIs), failing resource allocation, or counterproductive incentives.

02

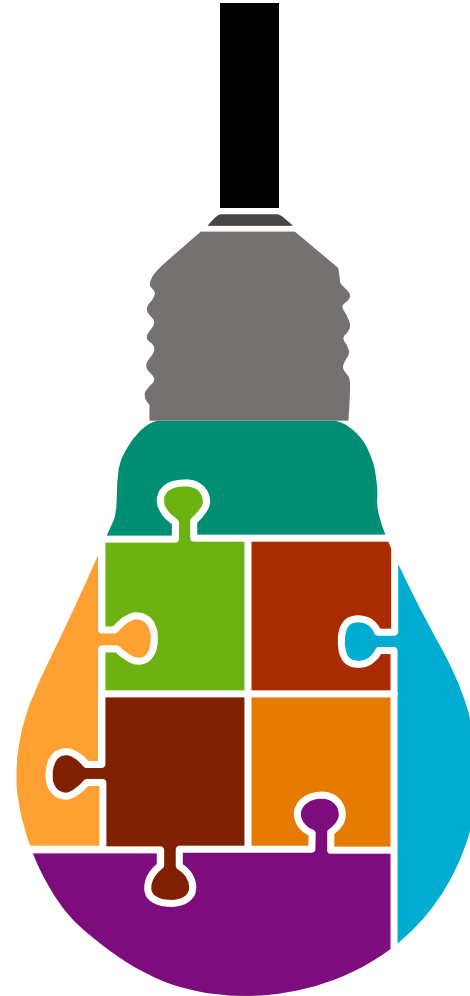
Strategy not Feasible

Having an unclear, unfitting, unconvincing, uninspiring, non-actionable or otherwise ineffective strategy.

03

Lack of Alignment

When there is misalignment, the overarching corporate strategy gets diluted at lower levels, resulting in silo behavior and not everyone being on the same page.



04

Ineffective Project Management

Includes missing or conflicting priorities, unclear responsibilities, exceeded budgets, bad time management, delays, and poor or missing leadership at various levels in the organization.

05

Ineffective Communication

Communication is too vague, too late, too early, too much, too little, to the wrong people, or otherwise ineffective

06

Ineffective Change Management

Problems in this area include resistance, lack of commitment, no buy-in. These are largely resulting from not having involved and engaged people enough during strategy generation and execution.

Where are we in the Strategic Management Process?



Assurance and Evaluation

Ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues.

Strategy reviews



Strategy Deployment and Alignment

Make the strategy achievable by involving the organization to own their part of the Strategy. Individuals align their performance goals to organizational goals and milestones.

Align using catchball
Implement communication plan



Environmental Scan

Initiating the process is deep strategic thinking and environmental scanning to set context for the internal and external environment.

Conduct a SWOT/PESTAL
Environmental Scan



Strategy Formulation

Develop a high-level strategy including identifying what success looks like and what it will take to get there.

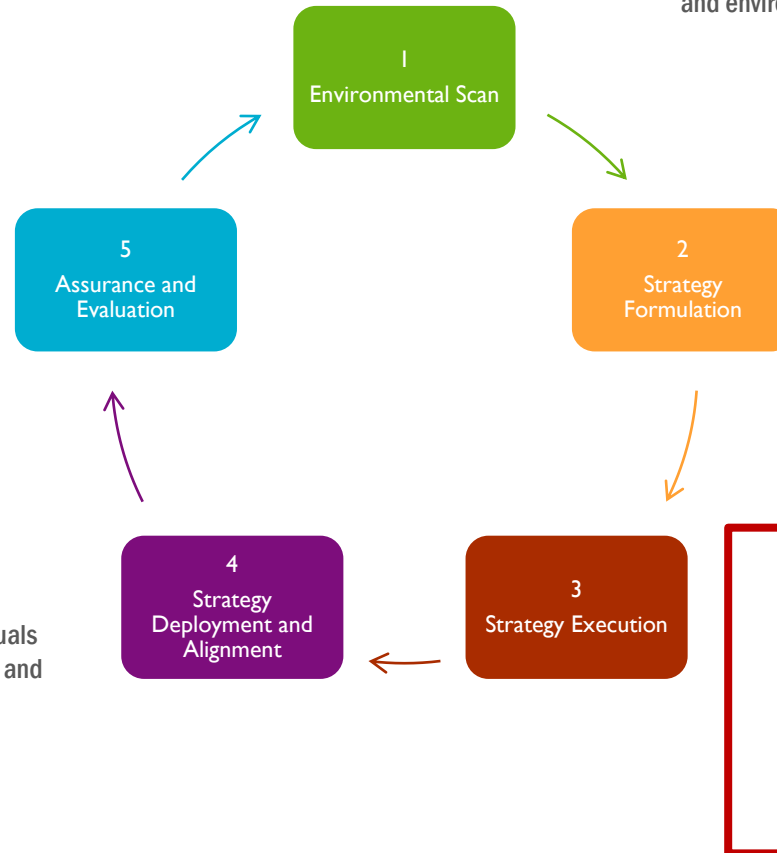
Purpose
Vision
Goals



Strategy Execution

Translate high-level strategy into operational planning and action items.

Milestones
Strategic Measures and Metrics



Ineffective Performance Mgmt.



Strategy not Feasible



Lack of Alignment



Ineffective Project Mgmt.



Ineffective Communication

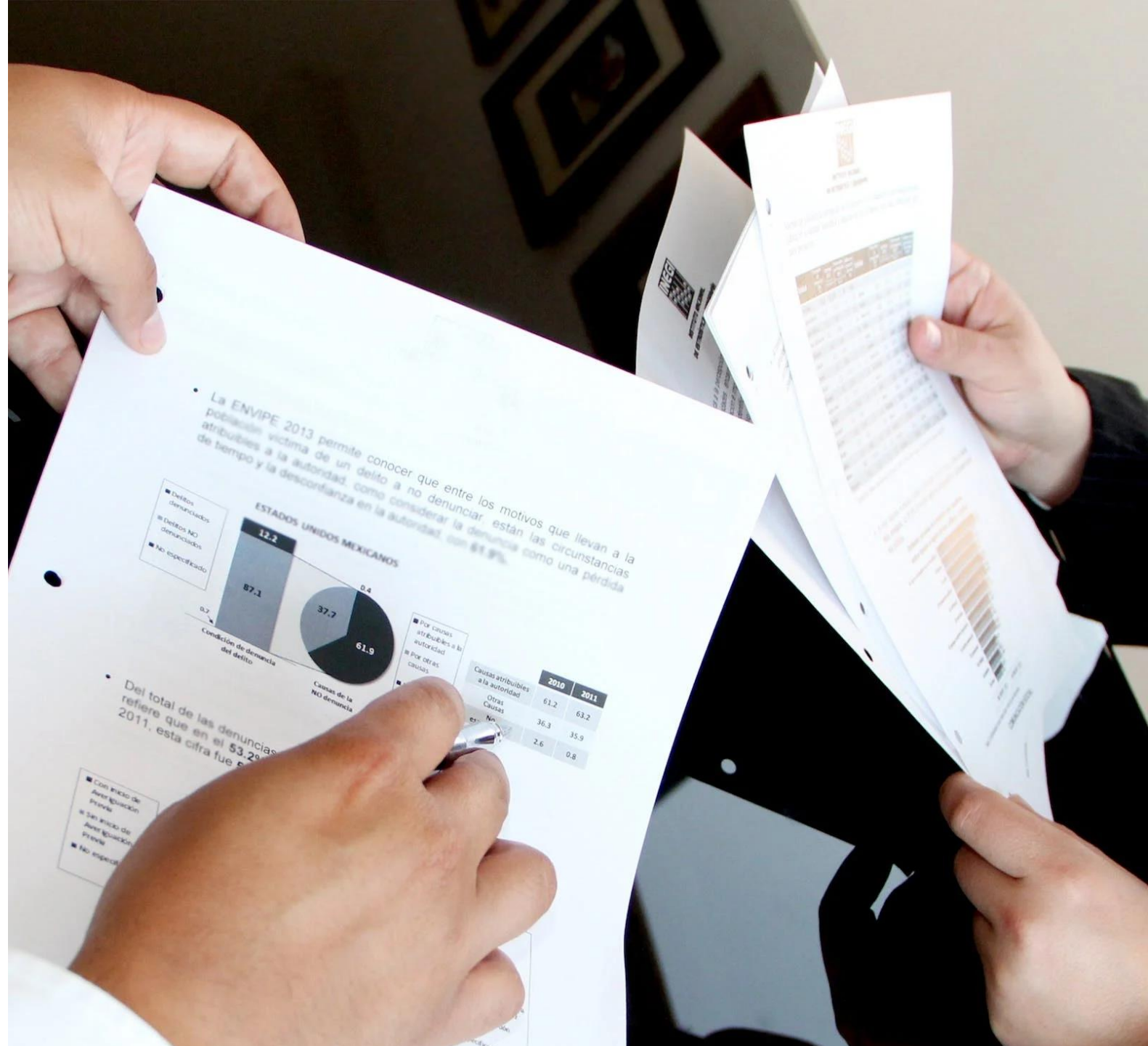


Ineffective Change Mgmt.

Performance Metrics

How many of you use performance metrics to evaluate if you are on track or not on track to achieve your strategy?

92% of organizations do not track the key performance indicators that tell them how well they are doing.



Performance Management



Why?

Feedback loops and metrics help us understand if we are achieving the results we intend.

What?

Qualitative and quantitative measures, including activity and outcome based measures.

How?

Brainstorm potential performance measures, prioritize the most relevant and feasible measure, and collect both a baseline and plan to collect results for the next target condition.

1

Ineffective Performance Mgmt.

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Strategy not Feasible

3

Lack of Alignment

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Ineffective Project Mgmt.

5

Ineffective Communication

6

Ineffective Change Mgmt.

Monitor to Realize Results

Our goals identify what we want to achieve in 5 years.

Our milestones identify what we want to achieve in 1 year to help us to achieve our goals.

Metrics provide feedback loop to tell us if we are achieving the **results**, we intend.

Vision: Put a man on the moon by the end of the decade so that we can win the space race (JFK, May 1961).

Goal: In 3 years, using rapid design and experimentation to create a solution that withstands high speed and temperatures, we will successfully land a manned craft on the moon in three years.

Milestone: By 6/30/1962 conduct 3-5 experiments to close knowledge gaps and enable a manned craft moon landing.

Measure: Number of knowledge gaps closed.



Measures and Metrics

To provide feedback that indicates whether we are on track to achieve each milestone.



Milestone 1. Populate the organization's milestones	Potential Measure 2. Brainstorm how we might measure progress towards each milestone. A measure is a number and its unit of measurement (e.g., hrs.). 3. Vote on the most relevant and feasible measure for each milestone	Baseline 4. Identify current level of performance.	Target 5. Identify the desired level of performance for a given time period.
Develop and implement a comprehensive, integrated and portfolio-based strategy for Infrastructure and Operations.	<ul style="list-style-type: none"> • Infrastructure investment process maturity • Amount of infrastructure funding provided • Number of investment priority lists 		

Expected outcome: Identify measures and metrics that will address relevant questions and evaluate desired outcomes

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11 Deployment and Alignment



Make the strategy achievable by involving the organization to own their part of the Strategy. Individuals align their performance goals to organizational goals and milestones.

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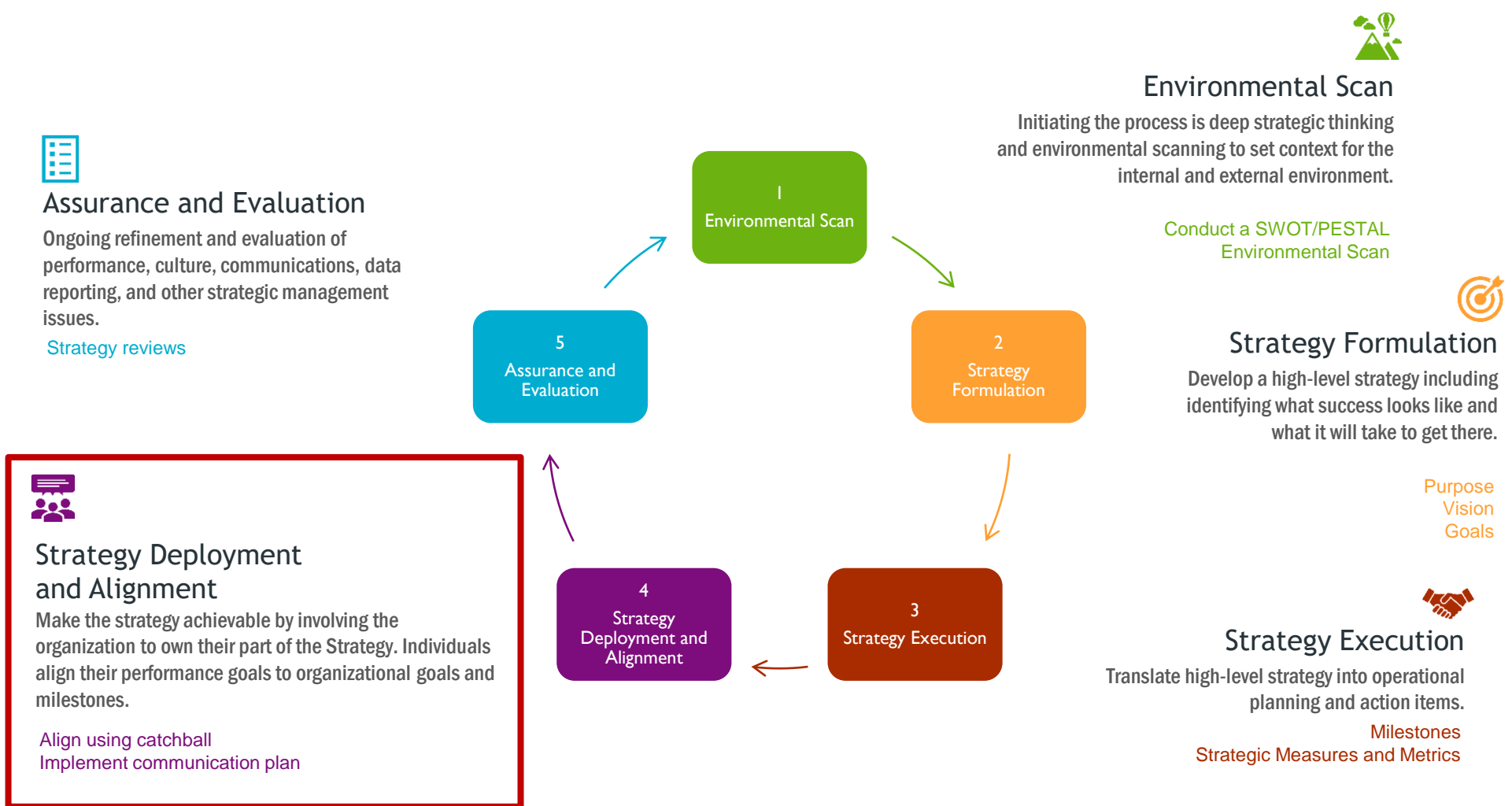
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Ineffective Communication

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Ineffective Change Mgmt.

Where are we in the Strategic Management Process?



Deployment and Alignment



1. Raise your hand if you believe your organization achieved two-thirds or greater of its annual strategic goals.

10% of leaders agree with you

2. Raise your hand if you believe failure to coordinate across the organization was the single greatest challenge to implementing strategy.

30% of leaders agree with you

3. Raise your hand if you believe your organization is good or excellent at successfully executing project in order to deliver strategic results

46% of leaders agree with you

Source: Boardview



Strategy Deployment and Alignment



Why?

- Improve vertical and horizontal alignment, including alignment on priorities, to implement our strategy and realize results.
- Create buy-in and engagement at every level of the organization.
- Define executable action plans.

What?

A process to make our Strategy to Action Plan achievable by involving the organization to develop and own executable plans.

How?

Catchball - two-way communication between leaders and the person accountable to deliver results.

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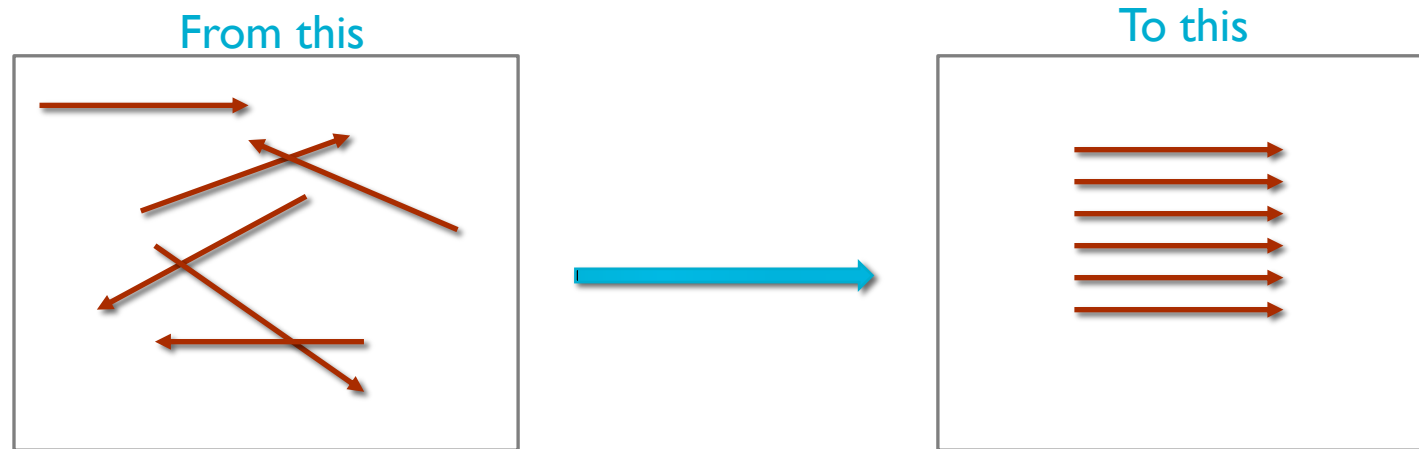
Ineffective Communication

6

Ineffective Change Mgmt.



Catchball is a process or series of conversations to make our Strategy to Action Plan achievable by involving the organization **to develop** and **own** executable plans.



Why this matters:

- Improve vertical and horizontal **alignment** to implement our strategy and realize results.
- Create **buy-in** and engagement at every level of the organization.
- Define **executable action plans**.

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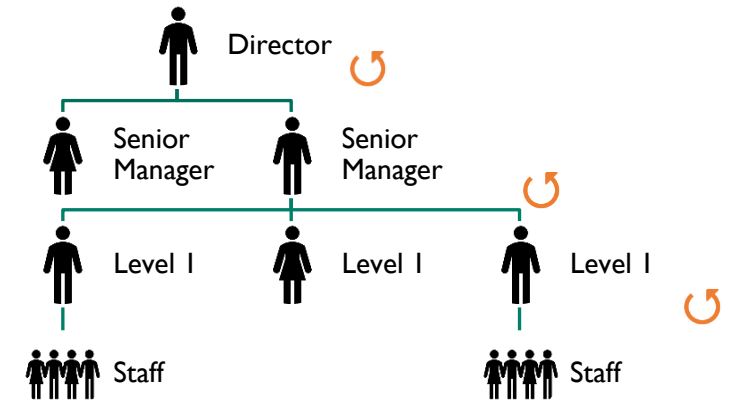
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How to Play Catchball



1. Schedule time for two-way communication with your direct reports.
2. During your scheduled time, share your Strategy to Action Plan and communicate how your direct reports will contribute to implementing the plan. Ask questions to obtain feedback.
 - Is the scope executable in the timeframe given?
 - What help is needed?
 - Are the goals and objectives clear?
3. Incorporate feedback from the team into your Strategy to Action Plan.
4. Ask team members to create their own Strategy to Action Plans for the part of your plan they are responsible for implementing. Leaders at each level complete this process until the lowest level reviews the plan and provides feedback to the level above.



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Catchball checklist

Key topics to cover during a catchball conversation



As the leader...

- Provide strategic context for what and why we want to accomplish a set scope of **work** or result
- Define the time horizon to achieve said results
- Ask for feedback including what is needed to be successful (e.g., more resources? Change in scope?)
- Be clear about priorities
- Act on direct report feedback and revise the Strategy to Action Plan based on feedback

As the milestone owner...

- I understand the strategic context or why my leader want this work
- I understand the scope of the work
- I know when the work is planned to be completed and work priorities
- I understand the quality level (e.g., draft, final, approved) of the work
- I know who to involve to plan and execute the work
- I have the resources I need to complete the work

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Strategy Deployment and Communication



Why?

Engage key stakeholders, including suppliers in what your strategy is and how best to partner

What?

Create stakeholder alignment

How?

Deployed communication plan

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Our Communication Plan



Audience <i>Internal/ External/Who will Receive Comm.</i>	Description <i>Name of the communication</i>	Purpose <i>Priority Update, Results Update, Issue Sharing, or Decisions Made</i>	Frequency/Date <i>How often it will happen or when</i>	Method <i>Email, In-Person, etc.</i>	Owner <i>Responsible party to complete</i>

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Ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues.

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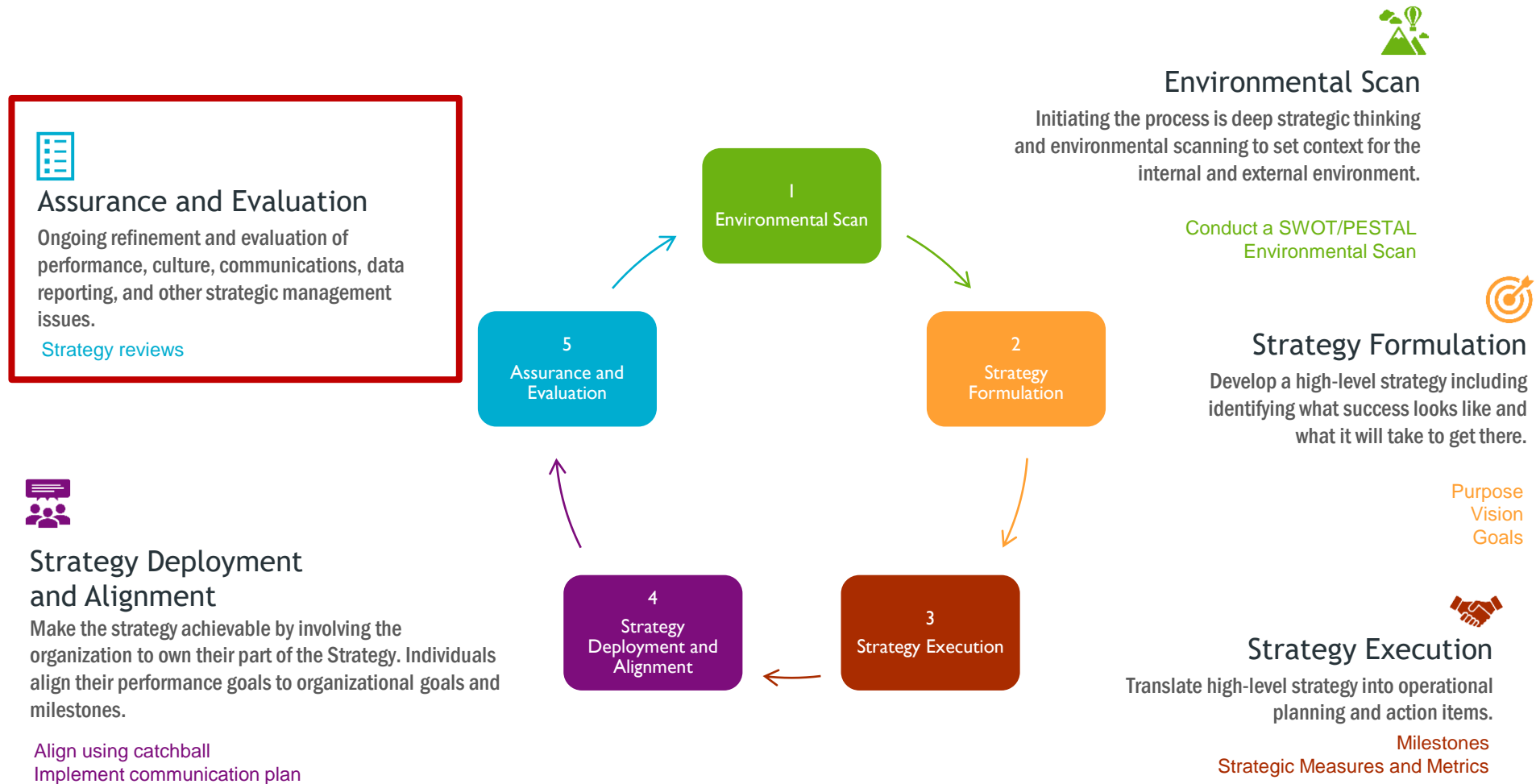
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Where are we in the Strategic Management Process?



Assurance and Evaluation

Leaders in my organization spend less than a day a month on reviewing strategy.

70% of leaders agree with you



Strategy Assurance and Evaluation



Why?

To help us be intentional and proactively review progress and make decisions that will enable us to achieve results. This is the accountability part of the strategic management process.

What?

Periodic management reviews of progress towards goals and objectives to identify actions needed, manage long-term risks, conduct deep dives of 1-2 strategic topics, and identify accomplishment to celebrate.

How?

Strategy review meeting to take action at different levels of the organization and at various intervals.

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Strategic Reviews

WHY

To help us be intentional and proactively review progress and make decisions that will enable us to achieve results. This is the accountability part of the strategic management process.

Review progress

Status progress, remove barriers, and take action, including re-prioritization

Celebrate Success

Identify accomplishments and celebrate them as part of your rewards and recognition process



Manage long-term risks

Discuss risks that could impact the team's ability to deliver goals and identify decisions or actions needed to manage risks

Conduct a Deep Dive

Discuss 1-2 topics that could affect the long-term success of the organization

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Our Strategy Review Structure



Tactical



Strategic

Information

Frequency	Meeting Name	Attendees	Key topics	Duration
Daily/Weekly				
Monthly				
Quarterly				
Annual				

Decisions

Monthly - Look deeper into 1-2 topics that could affect the long-term success of your organization.

Quarterly - Review strategy, potential trends, key personnel, and engage in team development

We will embed strategic reviews as part of our meeting structure to act on topics that are more long term and not tactical in nature.

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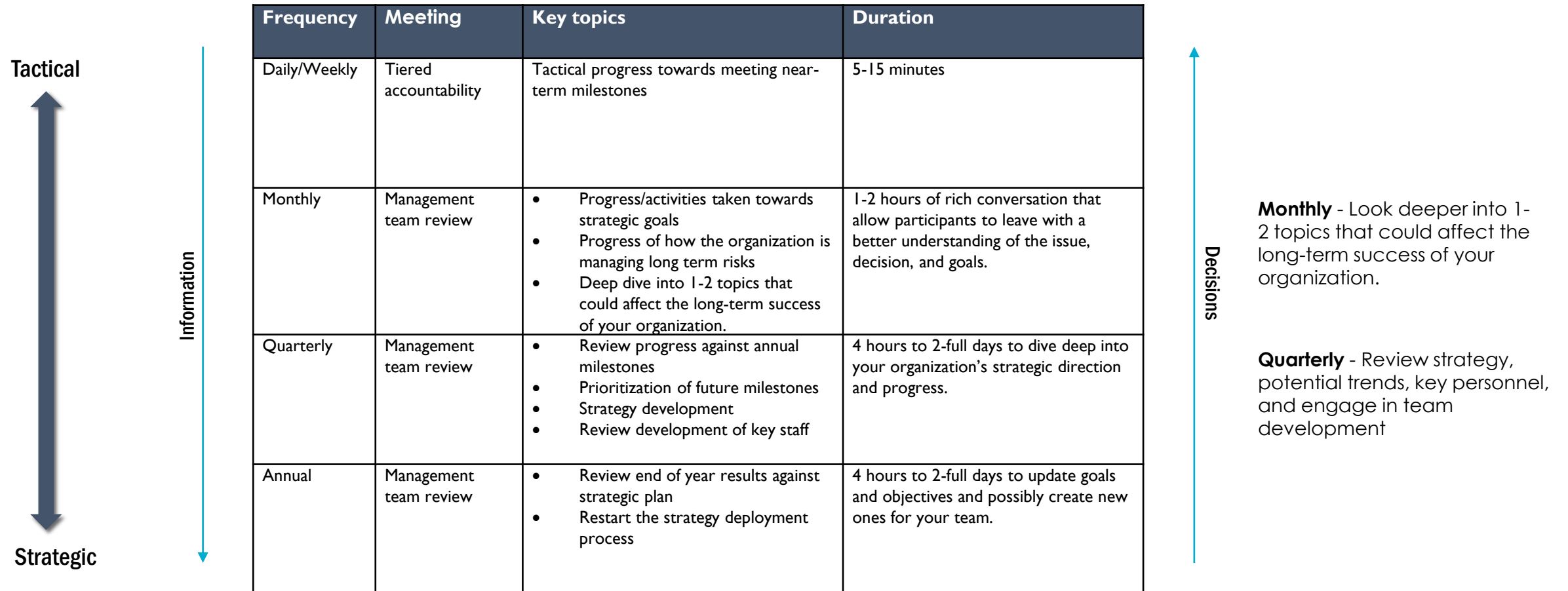
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Our Strategy Review Structure – an Illustrative example



1

Ineffective Performance Mgmt.

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Preparing for Strategic Reviews



An agenda and expected outcomes will be sent to all attendees in advance of the meeting.

Each Milestone Owner updates our Strategy to Action Plan with results.

1. Prepare metrics and data to help assess progress
2. Short statement of results for the month/quarter
3. If an item is off track and requires attention, include a short comment explaining the performance gap and actions to address the gap or identify help needed.

Everyone in attendance should read the file and be ready to discuss.

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What to expect at strategic reviews

Rich engagement, decision making, and identification of actions needed to enable us to achieve our strategy, including:

1. Removing barriers
2. Reprioritization of goals and milestones
3. Reprioritization of people assigned
4. Adding resources
5. Altering the plan or
6. Other decisions

Minutes with decisions or action items will be distributed after the meeting.



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- **Leader-led activity** with high team engagement.
- **Strong, visible ownership** of overall organizational performance.
- General understanding of how team goals and objectives **tie to the larger organizational strategy**.
- **Commitment to a shared vision of success** and priorities based on goals and objectives.
- State goals and objectives in a way that is **specific, measurable, attainable, results-focused, and time-bound (SMART)**.
- Agreement that all **actions and decisions are aligned with the organization's goals** and objectives.
- Ability to **think critically and challenge effectively**.

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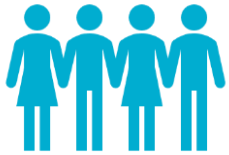
Ineffective Change Mgmt.



Breakout Session

Discuss your strategy implementation challenge and identify 1-2 actions you would like to take to improve your organization's ability to achieve their strategic goals and objectives.

If you're stuck, let's help each other explore options.



Ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues.

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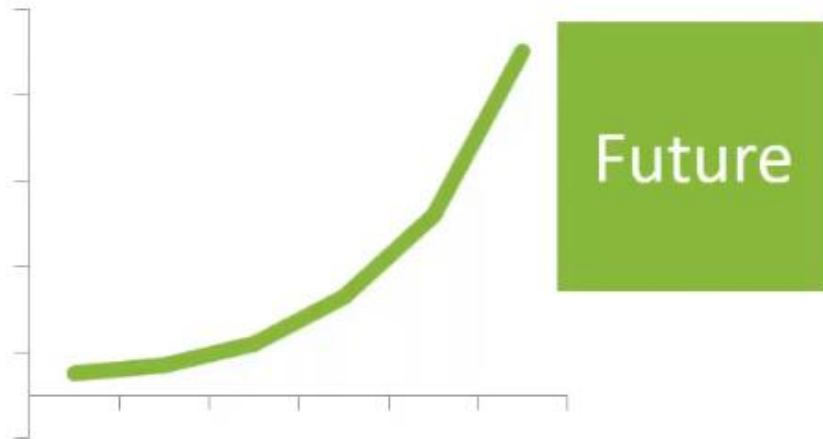
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Organizational **Benefits**



What the organization **gains**

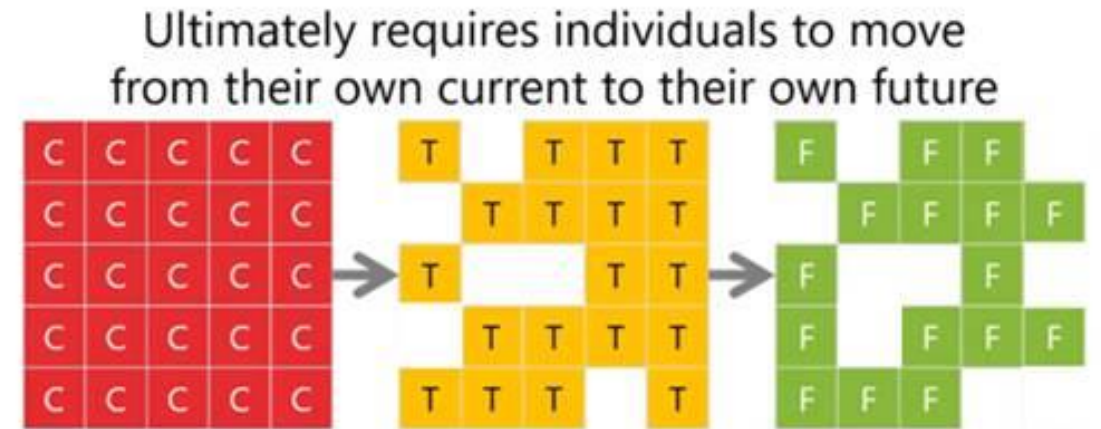
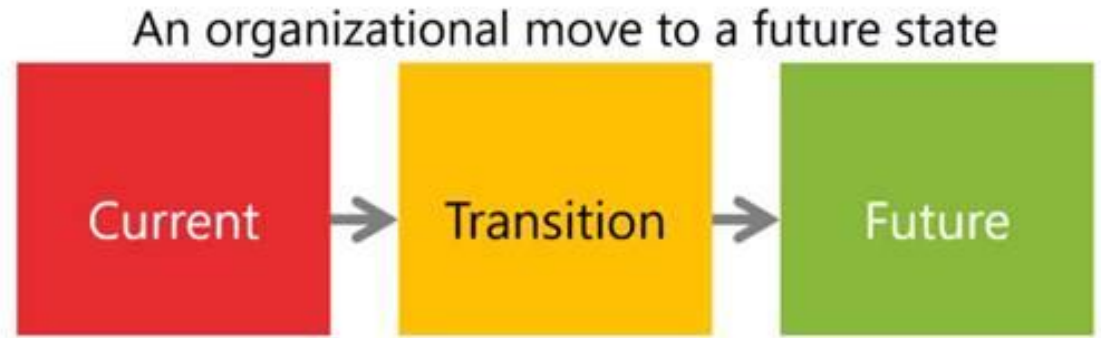
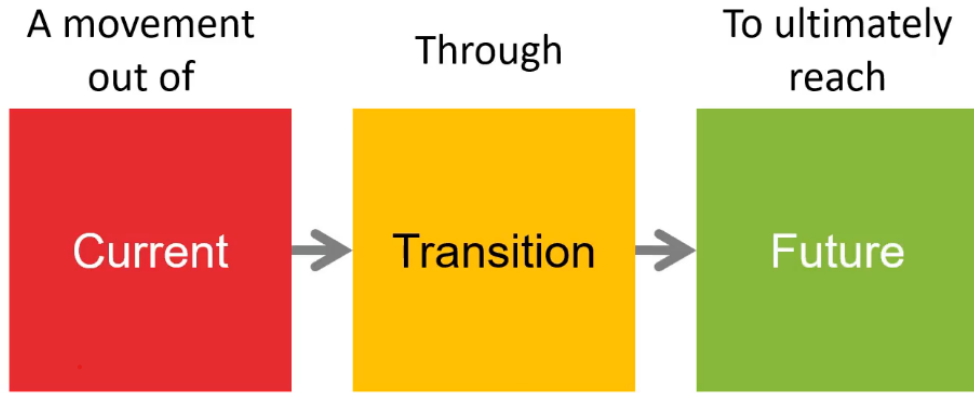
Project **Objectives**



What the project **achieves**

- 1 Ineffective Performance Mgmt.
- 2 Strategy not Feasible
- 3 Lack of Alignment
- 4 Ineffective Project Mgmt.
- 5 Ineffective Communication
- 6 Ineffective Change Mgmt.

What is change management?

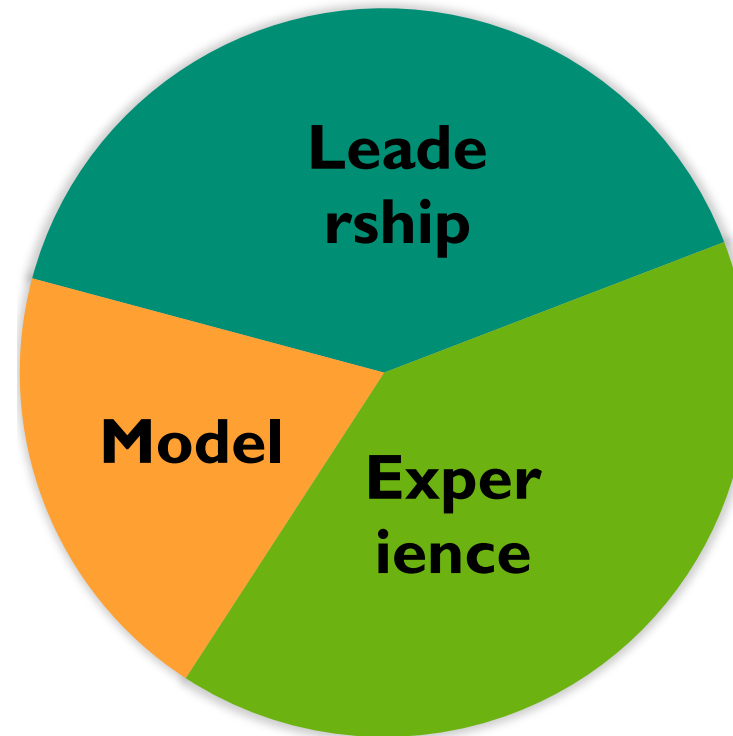


Good change management makes achieving objectives and receiving anticipated outcomes 6x more likely.

- 1
 Ineffective Performance Mgmt.
- 2
 Strategy not Feasible
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How you as a leader support your team, and having experience with change management are more important than the model you choose



There are many useful models, but none are perfect.

Leverage your own experience in navigating change.

2x Leadership + 2x Experience + 1x Change model = successful change

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People Focused

Successful change is people dependent

Start with why

“WIIFM?” Why should they support and participate in the change?

Communicate

“What is the change?” “How do I change?” “How are we doing?”

Active/Visible Leadership

Who is the sponsor? What do you need them to do?

Beyond Training

Training + practice + coaching = proficiency.
Proficiency = realizing expected outcomes

Remove Barriers

What are the impacts? What barriers can you remove ahead of time? What feedback are you getting?

Celebrate

All the wins. Big and small. Build momentum by acknowledging the milestones, not just the finish line.

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1 Project Name
Topic

2 Purpose
Why

3 Particulars
What

4 People
Who

5 Context

**6 Connection
(impacts)**

**7 Positioning
(gratitude)**



Ineffective Performance Mgmt.



Strategy not Feasible



Lack of Alignment



Ineffective Project Mgmt.



Ineffective Communication



Ineffective Change Mgmt.

Levers to make change happen



Tools and Methods

Infrastructure



Communication

Messaging
Frequency
The Why



Templates
Processes

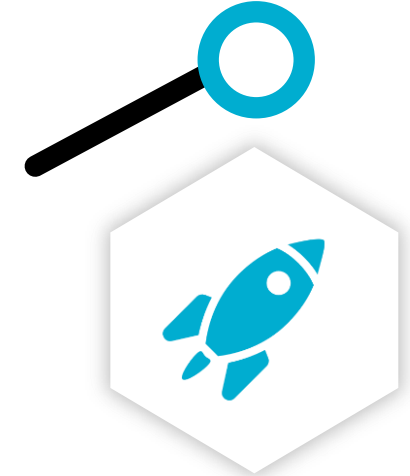


Education

Training
Coaching
Structured reflection



Resources
Roles and responsibilities



Application

Actual changes to be made

Leadership engagement: be personally involved in all the above levers!



What: Communication, Beyond Training
Active Visible Leadership

Who: Change Management Team
Project Planning Alignment



Communication



Tools and methods



Education



Infrastructure



Application



1 Ineffective Performance Mgmt. 2 Strategy not Feasible 3 Lack of Alignment 4 Ineffective Project Mgmt. 5 Ineffective Communication 6 Ineffective Change Mgmt.

Learn More



Training

[Haines Centre for Strategic Management](#)

[American Management Association](#)

[University of Texas at Austin](#)

Books

[Innovating Strategy Processes](#) by Johan Roos, Claus D. Jacobs, Franz W. Kellermanns

[HBR's 10 Must Reads: On Strategy](#)

[Contemporary Strategy Analysis](#), by Robert M. Grant







Thank
You!

