

To Soar Like a Phoenix You Need to Follow a Plan! How to Implement a Strategic Plan

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Lisa Deane is the Chief Member Services Officer for the State Bar of Arizona. She oversees all programs and services for members including professional development; publications; MCLE; committees and sections; diversity programs, the Board of Legal Specialization and a resource center handling dues processing and inquiries from members and the public. Her position also includes working with Board task forces and the Program Review Working Group which focuses on reviewing all new and current programs and services. Prior to her current position Lisa was the Bar's CLE director. Before this long-time stint of working for the Bar, Deane was the Assistant Dean for Admissions at Franklin Pierce Law Center in NH. Positions held before that, are distant memories. Deane holds a BA in Social Work from the University of New Hampshire, a JD from Franklin Pierce Law Center and a Franklin Covey certification to teach Project Management for Non-Project Managers. Lisa serves on a number of Boards including the Arizona Judicial College Board, the National Association of Bar Executives, the Arizona Women Lawyers Association and the Back to School Clothing Drive. Active for many years with the Association of Continuing Legal Education (ACLEA), Deane is a past president and also served as co-chair of the State and Providential Special Interest Group and the Executive Leadership Special Interest Group. For other fun Deane enjoys scuba diving, photography, camping and playing with her dog Mr. Tucker and grand-dog Skeeter.

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Donita Bourns Douglas is Executive Vice President of Client Success for InReach, a leader in providing continuing education (CE) management solutions. Prior to working for InReach, Douglas served as Director of Educational Programs for the Oklahoma Bar Association. Previously, Douglas held the positions of instructor and interim director of Legal Research and Writing at the Oklahoma City University School of Law. She also served as Regional Coordinator of the Jessup International Moot Court Competition. Douglas is a past president of the Association of Continuing Legal Education (ACLEA), a world-wide organization. Previously, she held the positions of secretary, treasurer, co-chair of the State and Provincial Bar Special Interested Group, and chair of the Exhibitor Committee. Douglas holds a Bachelor of Fine Arts degree, cum laude, in Journalism from Southern Methodist University and a Juris Doctor degree from the University of Oklahoma College of Law, where she was a member of Phi Delta Phi. After graduation, she practiced with the law firms of Fagin, Hewett, Mathews & Fagin and Clark, Stakem, Wood & Douglas. Her Martindale Hubbell rating is A/V. Douglas received the Oklahoma Bar Association's Earl Sneed Award for outstanding contribution to continuing legal education in 2012, a President's Award in 2003, and she is a Fellow of the OBA/Young Lawyers Division. She was awarded the Mona Salyer Lambird Spotlight Award in 2007, served on the OBA committee that drafted the Oklahoma Supreme Court Settlement Rules, and is an emeritus member of the Ruth Bader Ginsburg Inn of Court. Douglas has three above-average sons and is a big sports fan, especially University of Oklahoma football (Boomer!) and OKC Thunder basketball.

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January 2019

“Git-R-Done”

Larry, the cable guy

Donita Bourns Douglas
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Part 1: Background

Summary

A strategic plan provides a roadmap of your organization's direction and assists leaders and staff in moving goals forward. Creating a plan is not the difficult part, it is acting on the plan. There are many factors which may inhibit strategic plan movement, including having a staff or leaders that are not clear on the organization's direction; a staff or leaders with no investment if they were not engaged in the planning process and the whirlwind of the day-to-day job which makes it difficult to take on something as significant as strategic plan implementation.

Information and data analysis necessary to develop and drive the execution of a plan should come from your stakeholders, including your staff and leaders. Doing so is critical to creating a plan that has any potential for success. Those required to execute on the plan will feel engaged and ready to roll up their sleeves and tackle the tasks at hand.

Unfortunately, even if all the pre-planning and strategic plan execution is done right, plans are often left to collect dust on a shelf with no organizational commitment to the most important step, to execute the plan. A few years later, the strategic planning process is repeated with the hope that this time the plan will bring about change.

“Insanity is doing the same thing over and over and expecting different results.”

Commonly credited to Albert Einstein

What is a Strategic Plan?

Yeah, we're cool. We googled it.

- an organization's process of defining its strategy or direction and making decisions on allocating its resources to pursue this strategy.
- a document that articulates both the decisions made about the organization's goals and the ways in which the organization will achieve those goals. The strategic plan is intended to guide the organization's leaders in their decision-making moving forward.
- an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.

Why Have One?

“Even if you're on the right track, you'll get run over if you just sit there.”

--Will Rogers

- o **Set the Direction that Drives Results.** Everyone on your team and in your organization needs to know where the organization is headed. A strategic plan can remind us to assess our work to insure our efforts align with the organizational mission and direction. Absent any plan it is easy to be caught in the whirlwind of the day-to-day activities without achieving results that move the organization forward. The plan also serves as a reminder to periodically reassess our direction to determine if any directional changes need to happen. A plan is, however, for guidance and not control. It needs to be nimble and adaptable to changes in the environment.
- o **To Make Sure Everyone is Rowing in the Same Direction.** A written plan insures everyone on your team uses the plan in developing their own job goals, and it guides their performance.
- o **Keeps the Focus.** Without a plan, the team is left to carry out tasks and activities they believe should happen without the information to confirm what they are doing is desired. Mapping out a plan helps to insure the organization is looking to achieve results, not merely activities. Additionally, having a plan should keep us from being distracted into pursuing endeavors, which will not produce results consistent with the plan.

Why Do Strategic Plans Fail?

“Only 23% of companies use a formal strategic planning process to make important decisions. In 52% of companies, these decisions are made by a small senior group.”

McKinsey & Co.

- o Lack of understanding of the organizational objectives, and what needs to get done.
- o Lack of the ability to pivot when changes to the plan need to be made. Agility is key to carrying out a plan as there may need for modification of the goals and objective. Lack of innovation, which is the failure to try something new and dangerous.
- o Lack of resources, human and financial.
- o Lack of allocation of time, and the day-to-day job gets in the way. To execute the plan, meeting and work time needs to be set aside to focus on plan implementation. Otherwise the day-to-day job will eat up any available time.
- o Lack of communication: top down and bottom up. Employees should have input and senior management should share the plan, and how employee engagement in the plan is critical.
- o Lack of buy-in from the team tasked with executing the plan. This is likely to happen if the team is not engaged in the process of creating the plan.
- o Lack of management of the implementation: identify actions and implement.
- o Lack of organizational culture to support change.
- o Lack of accountability and ensuring that things are getting done and milestones are met.
- o Lack of alignment with individual staff goals, so no one is tasked with accomplishing initiatives identified in the plan.
- o No celebration of the successes along the way for accomplishments that have been made.

- o Lack of engaged leaders. No one driving the process from the top.
- o Lack of a streamlined plan. There are too many objectives, and every objective is worked on all at one time, resulting in no one thing getting completed.

How can Strategic Plans Succeed?

With a plan for execution.

Part II: The Leader's Overview: The Foundation to Executing a Strategic Plan

"Success is simple. Do what's right, the right way, at the right time.

--Arnold H. Glasow

- o Roll out your plan to the entire organization. Make sure every employee understands what the plan is attempting to achieve.
- o Identify the plan owner.
- o Set the management structure and give clear lines of authority for plan implementation.
- o Have the right people, with the requisite skills, in place to support the plan implementation.
- o Provide enough funds and time to support plan implementation.
- o Have open lines of communication about plan implementation, both formal and informal and up and down.
- o Build department plans around the organization's plan.
- o Set up a scorecard for tracking plan implementation.
- o Conduct monthly executive meetings to track progress.
- o Conduct an annual plan review.

Part III: Executing on a Strategic Plan

"If you chase two rabbits, you will not catch either one".

-Russian Proverb

Identifying the Goal on Which to Focus

Background:

While your organization may have four to five organizational goals, it is best to limit your department to two to three goals. There is a direct correlation between the number of goals and

the inability to execute on them. The greater the number of goals, the less likely that any goals will be met. And unless you have a conscious plan for executing goals, the strategic plan is likely to sit on the shelf and collect dust. With the enormous to-do list that employees face each day, unless there is a plan to focus on bigger, more strategic initiatives, it won't happen. And when urgent matters (day-to-day to-do list) and important matters collide what is perceived as urgent will always win.

While you will have two to three goals on which to focus, you may want to spend time on kicking off the work for each goal at varying times. This is considered the Wildly Important Goal (WIG) as termed by Franklin Covey. It is critical for the goal to be clear to all on the team to insure investment in doing the work. To identify the most important goal on which to focus first you may gather your leaders and staff and consider the following:

- o "What one area of our team's performance would we want to improve most (assuming everything else holds) in order to achieve the overall WIG (Wildly Important Goal) of the organization"
- o What are the greatest strengths of the team that can be leveraged to ensure the over WIG is achieved?
- o What are the areas where the team's poor performance most needs to be improved to ensure the overall WIG is achieved?"¹

Or you may sum it up by asking, "If every other area of our operation remained at its current level of performance, what is the one area where change would have the greatest impact?"² The WIG will be the most significant goal that has the most organizational impact. Keep in mind you want to make sure the goal you identify is fundamental to your organizational mission. It is key to consider what results you want so you don't focus on activities that may be nice to do but don't move the goal forward. If you have a large team that focusses on disparate organizational services, you may consider that one goal about which all departments may focus with the specific sub-goals set by individual departments.

Narrowing the Focus. Defining the Goal

"You must be single-minded. Drive for the one thing on which you have decided."

--General George S. Patton

After the one goal is selected, your team should work to define the goal and narrow the focus by identifying initiatives to meet the goal. This process is especially important if your team was not a part of the strategic planning process.

¹ McChesney, Covey and Huling, The 4 Disciplines of Execution, (Franklin Covey 2012) pg. 123

² Ibid., pg. 32

- o The brainstorm. When the team starts to brainstorm the initiatives that will accomplish the big goal they need to keep in mind that there are more ideas than time in the day to address and that all ideas that may be worth pursuing. Keep a flipchart on which to post the Good Ideas Parking Lot list of ideas that come up which may be appropriate to pursue later. Evaluating the list. As you review the list you want to identify the idea that will have the biggest impact to the larger WIG. And, you want to make sure:
 - o The idea is aligned with the organizational WIG
 - o The ideas you are considering will be measurable
 - o The team who would be working on the idea has the ability to influence and be responsible for the results of their effort
 - o That the results are driven by the effort of the team, not just the leader
- o Define your Goal. On paper rank each of the ideas by defining the idea, measuring where you are now with the idea, define where you want to get with the idea and the deadline for getting there. Once you have all this on paper you can review each to identify which has the likelihood of the greatest impact and thus the first goal to address. You will then need to determine what you want to achieve and the date you want to achieve it.

Lag Measures and Lead Measures: Moving the Goal Forward

“Planning is bringing the future into the present so that you can do something about it now.”
--Alan Lakein

Most organizations evaluate the effectiveness of what they are doing. Few organizations measure progress in getting to where they want to be in the future. FranklinCovey describes the difference in these two types of measurement as the Lag Measure and the Lead Measure.

The Lag Measure: “The measure of goal or WIG achievement. Historical measure of performance, the measure of your goal, e.g. End-of-year revenue, quality scores...” “Lag measures are typically easy to measure but difficult to influence directly. It can be expressed in terms of *from X to Y by when.*”³

The Lead Measure: “The measure of an action planned and taken as to a means of achieving a WIG. Unlike lag measures, lead measures are influenceable by the team and predictive of the goal. Good lead measures are the highest-leverage activities a team can engage in to ensure execution of the WIG; therefore lead measures are carefully tracked on the team scoreboard.”⁴

³ Ibid., pg. 299

⁴ Ibid, pg. 299

Lead measures should have milestones established to insure individuals are going down the right path. It is likely that a lead measure may take up to six weeks to complete.

An example of lead versus lag. With my goal of being thinner, I would like the scale to go from 150 to 130 by December 1. My lag measure is the weight on the scale I see, the lead measure is the number of calories that I consume. The lag measure is the result and easy to focus on it as it is what we want. Without reducing the calories in (an influenceable measure) the scale won't move. When identifying the lead measures to get us to the desired outcome it is best to focus on evaluating those ideas that have can have the most impact.

Having the team identify the lead measures is important to insure their engagement and ultimately accountability for the results. If lead measures are dictated by the leader the team may not feel accountable or take ownership of their piece of execution.

Scoring Your Work

Scoring your efforts at achieving the lead measures is critical to getting results. It conveys ownership of the project. As Peter Drucker is quoted as saying, "What doesn't get measured, doesn't get done." If we don't keep score than the work gets on the daily to-do list and its importance is reduced and ability to get completed is reduced. Scoring also insures the team is accountable for their work and to each other to produce results. Creating a simple to read scoreboard of lead measure progress is important as is having it be visible to the whole team. By doing so, those that may not have met their objectives by the deadline are likely not going to let that happen again.

The Scorecard

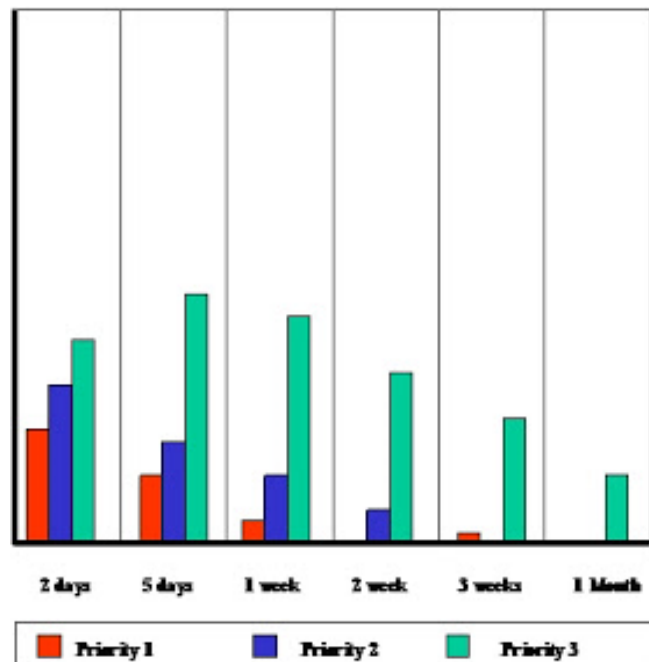


Lead Measure

Upsell our premium bar package to 90% of all events

90%

1 2 3 4 5 6 7



Age versus Priority example

Accountability

Execution of initiatives happens when there is accountability. The pressure to produce and the visibility of what is produced being on the scoreboard will drive results. The idea is for there to be a 15-20 minute weekly huddle where the team members will each report on the results of what they committed to the prior week. The sole agenda item is the reporting of results and committing to getting results for the next task. The results are then plotted on the scoreboard and the scoreboard is made visible for others.

Based on the discussion and debate, the team can make new commitments to impact the lead measures the following week. It is important to confirm that commitments have the potential to move the lead measures forward or the WIG won't be accomplished. It is during the accountability sessions that the lead measures can be adjusted. It is the ability to be agile and pivot that enables the group to be nimble and respond to outside influences and pressures. Note, that team members will usually only commit to one or two things they will do during the next week to move the lead measures.

Acknowledging the movement of the scoreboard and the successes associated with individual "wins" keeps the team engaged and motivated. And, it is critical to success that meetings are held weekly so that it becomes a habit. It is the sustained habit of meeting weekly that increases and ultimately solidifies the likelihood that the goal will be accomplished.

In addition to working for team accountability, you should work with the leaders of your organization to create accountability at higher levels. Regular reporting to a committee, a board, and/or during your executive team meetings, holds you and other leaders in your organization accountable for holding others (and you) accountable. These meetings also provide a continued opportunity to communicate on the progress in implementation.

The One Thing

“Curly: Do you know what the secret of life is?

Mitch: No, What?

Curly: This. [He holds up one finger.]

Mitch: Your finger?

Curly: One thing. Just one thing You stick to that and everything else don't mean sh*t.

Mitch: That's great, but what's the "one thing"?

Curly: That's what you've got to figure out.”⁵

⁵ Keller and Papasan, The One Thing, (Bard Press 2012), p. 7

The more sophisticated of you will recognize the above quote being from the classic movie “City Slickers.” Curly inspired another approach to execution, like but simpler than the 4DX approach, and it is outlined in a book by Gary Keller of Keller Williams fame. In “The One Thing,” Keller’s thesis is simple. Results come from focusing on one thing. “The key is over time. Success is built sequentially. It’s one thing at a time.”⁶

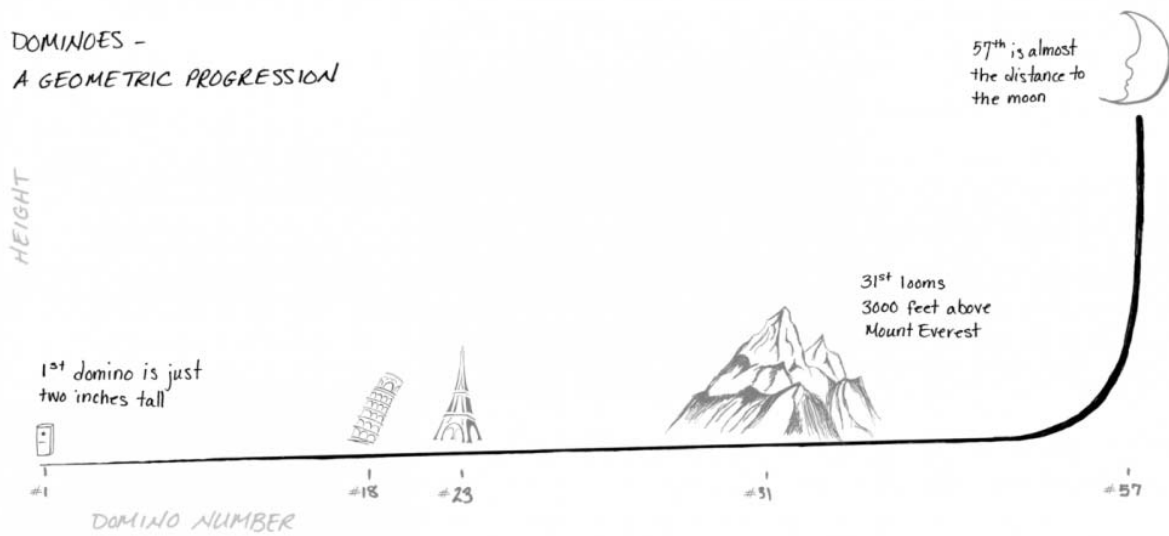


This approach is explained by Keller by examining the domino effect. We are all familiar with the lining up dominos and setting off the chain reaction. What you may not be familiar with is that each domino generates enough energy to knock over a domino that is 50% bigger.⁷

⁶ Ibid. p. 16

⁷ Ibid. p. 14-15

DOMINOES -
A GEOMETRIC PROGRESSION



Applying the domino effect and applying the geometric progression to implementation of a strategic plan means that teams identify their one big goal (others may come later). And acting as a team or an individual team member you take one step at a time toward your goal, always giving it top priority, and you build on it.

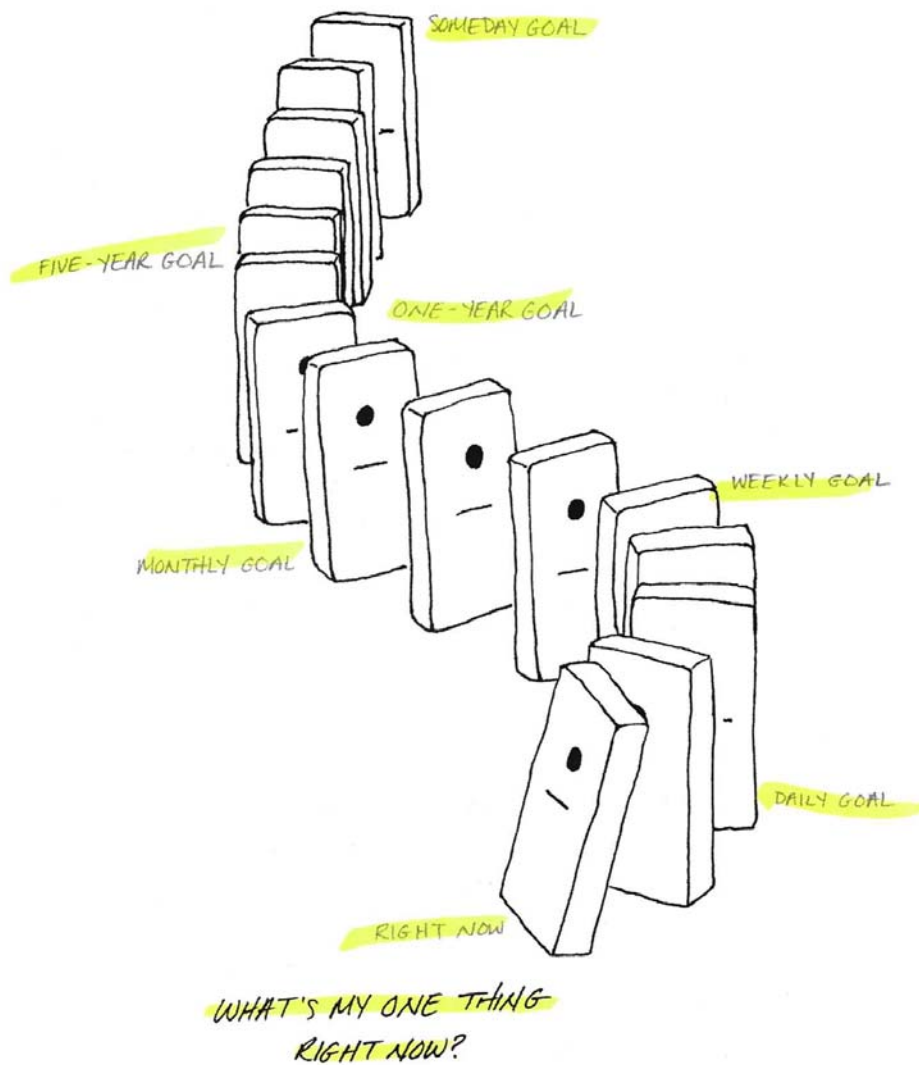
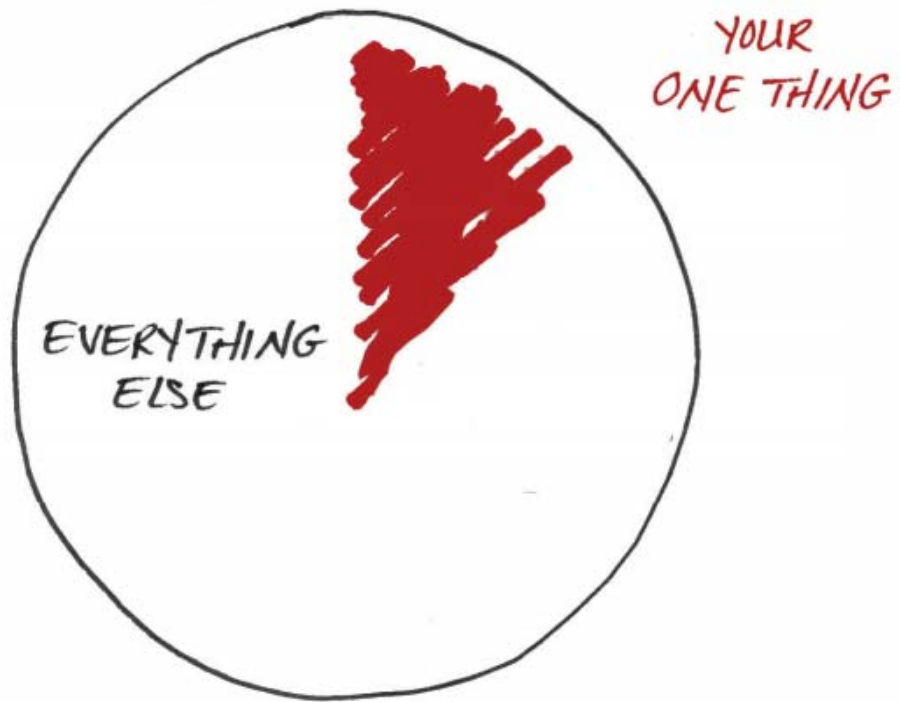


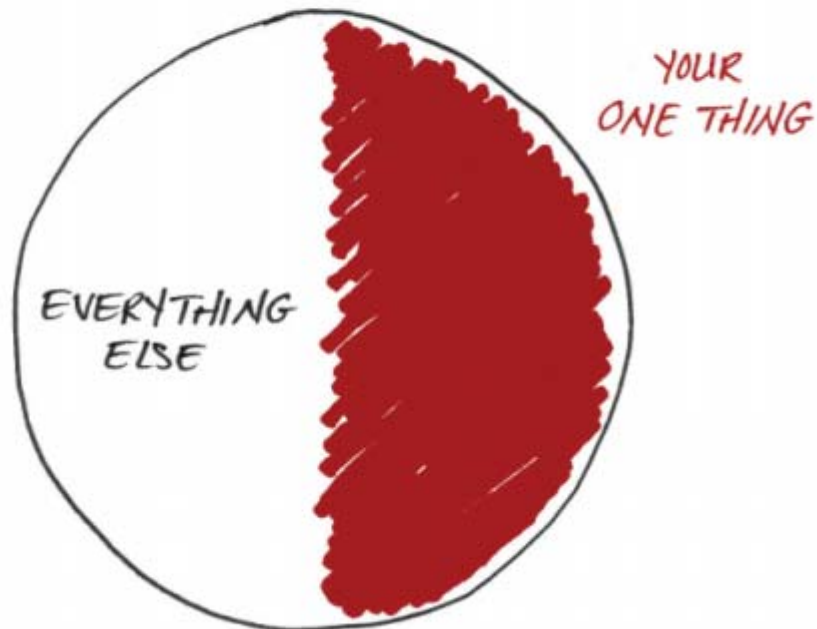
FIG. 25 Living a domino run.

Accountability comes from giving your one big thing priority and recognizing knocking things off a to-do list is not enough. To give your one big thing, the attention it deserves, you are going to have to work a different way: protect your time and avoid the typical day.

THE TYPICAL DAY



THE PRODUCTIVE DAY



Keller recommends that you block off four hours of your work day to work on the one big thing. Yes, four hours. Knowing how impossible that sounds to most of us, Keller recommends scheduling a time block for this work. He also gives pointers in creating this habit that leads to success.

Protect your time block:

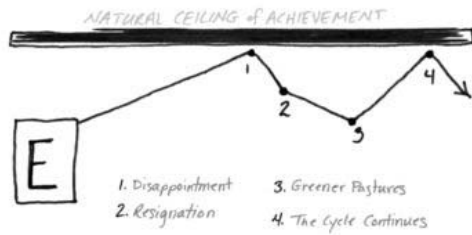
- Build a bunker: find a good place where you won't be interrupted and put up a "Do Not Disturb Sign."
- Store provisions: supplies, snacks, anything that prevents you from leaving your bunker.
- Sweep for mines: no phone, no email, no Internet.
- Enlist support: tell others when you will be available ask them to accommodate you.⁸

Take a purposeful approach to achieving the goal, and don't let life get in the way. The "accountability cycle" produces new habits, accountability and eventually success.

⁸ Ibid. pp 172-173

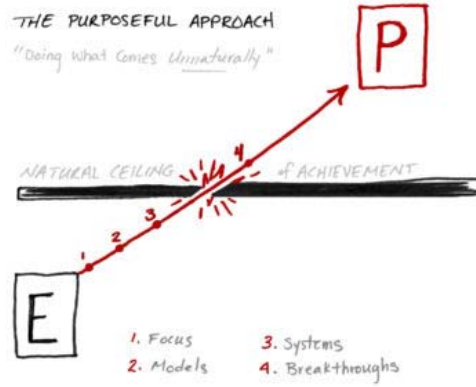
THE ENTREPRENEURIAL APPROACH

"Doing What Comes Naturally"



THE PURPOSEFUL APPROACH

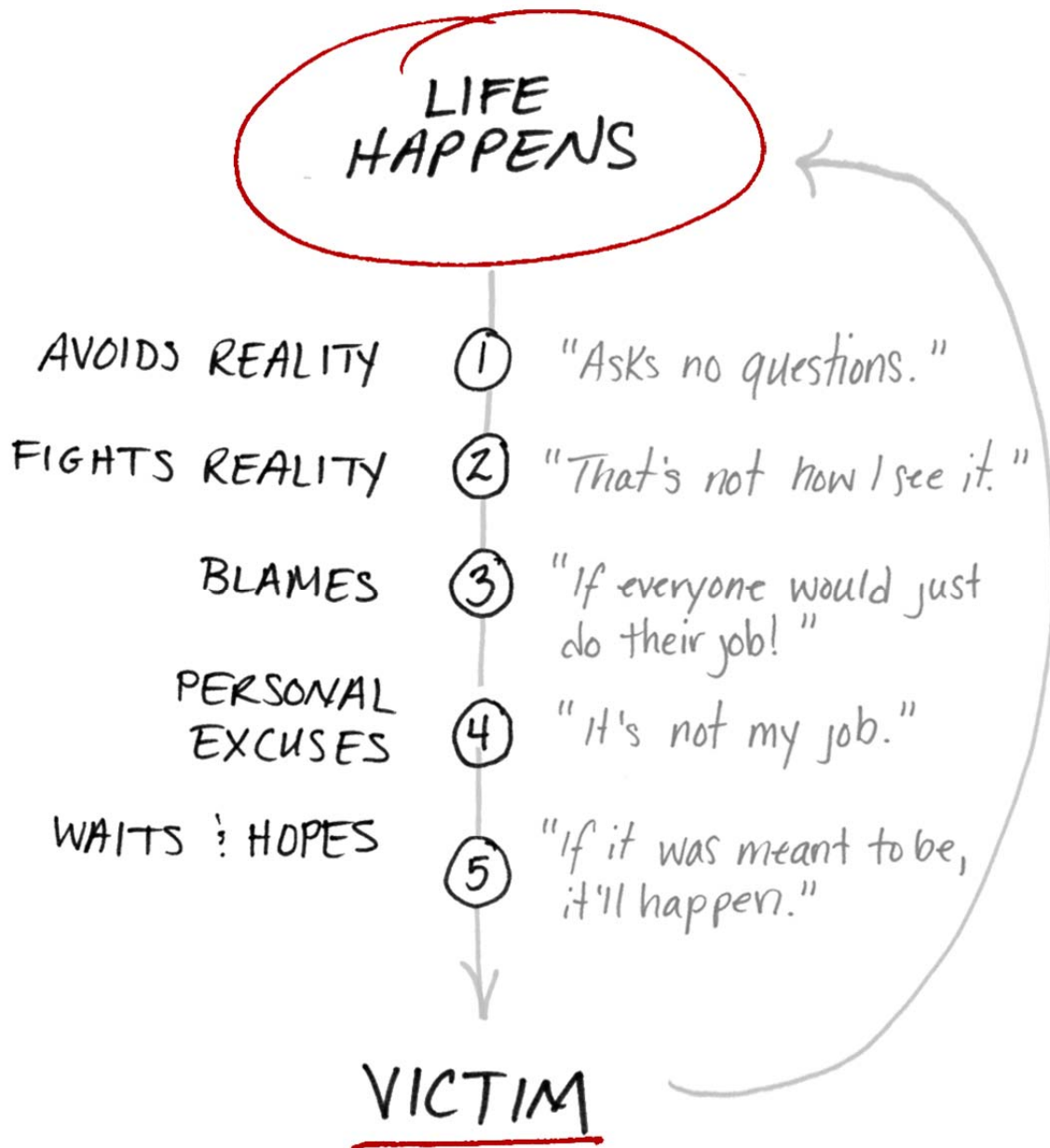
"Doing What Comes Unnaturally"



ACCOUNTABLE

- GETS ON WITH IT (5) "O.K., let's do it!"
- FINDS SOLUTION (4) "What can I do?"
- OWNS IT (3) "If it's to be, it's up to me!"
- ACKNOWLEDGES REALITY (2) "This is the way it is."
- SEEKS REALITY (1) "What's happening?"

LIFE HAPPENS



If you pull the one thing approach into implementation of a strategic plan, one-thing thinking becomes a part of everyday and purposeful work. As a leader, you must ask you team "What's the one thing you can do today, this week, next month...to accomplish the strategic plan goal.

Conclusion

For an organization to be responsive to its members' needs it must have a road map – a strategic plan. And, in order to have the plan do anything other than collect dust, it must be developed with the engagement of all stakeholders, including organizational leaders and staff. A process needs to be in place to create and empower teams which focus on plan execution and accountability for plan execution. Doing so will allow the organization to move forward, pivoting as needed, so that it may continue to address changing member needs.

“Only those who will risk going too far can possibly find out how far one can go.”

--T.S. Eliot

Cited Resources:

1. McChesney, Covey and Huling, The 4 Disciplines of Execution, (FranklinCovey 2012)
2. Keller and Papasan, The One Thing, (Bard Press 2012)

Other Resources

“UK: Implementing a Strategic Plan Successfully”

<http://www.mondaq.com/uk/x/140370/Operational+Performance+Management/Implementing+A+Strategic+Plan+Successfully>

“Strategic Implementation”

<https://onstrategyhq.com/resources/strategic-implementation/>

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<https://www.executestrategy.net/blog/guide-to-strategy-implementation/>

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“The Three C’s of Implementing Strategy”

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“4 Components of Strategic Planning: An Essential Guide to Strategy

<http://www.leadstrat.com/wp-content/uploads/2017/02/Strategy-Guide-4-Components-of-Strategic-Planning-Leadership-Strategies.pdf>