

## MAKE Strategy Review = Strategy Execution

Strategy execution is about getting other people, and yourself, to do things – the *right* things. And that doesn't happen in the typical, annual strategic planning ritual where people throw around some ideas and then check in a year later. Like weighing yourself every morning or checking your car's fuel gauge when you get in the car, we all need to know how we're doing while there's still time to act.

One of the simplest and best tactics in the struggle to execute strategy is the “goal review meeting.” In goal review meetings the team executing a strategic plan assesses their progress against that plan. The team might be the senior-most one in the organization or it might be departmental, or anything in between, including a project team. As long as they've broken their strategy(s) into goals with individual accountability, this approach will work. (If they haven't done that – well, that would be the place to start.) For years, we've been helping our clients with these meetings, and we've learned six success factors that make them work.



### #1: Include the right people

The people who are accountable for executing the plan are the ones who attend the goal reviews. That means the team leader – say, CEO – must be in the meeting, and so must those direct reports who each own a portion of the plan. That's *two tiers* of management; don't crowd three or four tiers of management into a room. If the plan cascades down through the organization, then each subordinate team can hold its own meetings for its portion of the plan.

Sending delegates to the meeting instead of the accountable parties is generally a no-no. And if the boss can't attend then the meeting should simply be rescheduled. These meetings require that the people who are accountable stand in front of the boss and peers and describe their progress. When substitute players are sent in, the meetings lose their effect.

Staff members who can contribute should also be invited. For example, if the organization possesses a planning staff – people who look after the planning



process – then members of that staff should naturally attend. In fact, they should facilitate the meetings if they have the training to do so.

If specialized topics will be discussed, then summon the specialists. For example, if legal matters will be discussed, consider inviting corporate counsel as a resource to answer questions.

## **#2: Meet often enough to matter**

Most organizations we've worked with hold their strategic goal review meetings monthly, bimonthly, or quarterly (*never* less often than quarterly). Project goal review meetings are typically held weekly.

What's the best frequency? Meet more frequently when launching an effort, because the plan is still being tested and understood. The people and the plan both need more frequent cycles in early phases. You can throttle back a little – say, from biweekly meetings to a six-week cycle – after it's clear that everyone is up and running.

Also lean toward more frequent meetings if you are imposing a lot of change on your organization or if the environment is imposing a lot of changes on your organization. Think of how often you make steering adjustments when you are driving a car fast, or when the road changes frequently. Same idea.

Frequent meetings accomplish several things:

- **Focus:** They keep people focused on execution. Day-to-day distractions tempt us all hugely, so the pressure to report progress in goal review meetings keeps everyone moving ahead and aimed in the right direction.
- **Flexibility:** They keep us agile. As people get into strategy execution, opportunities and problems are revealed and the team needs to respond accordingly. For example, one team member says, "I've got three people out with the flu, so I'm at a standstill on this." Another team member says, "I can loan you a couple of my people for a week." Or the boss can say, "Outsource that piece so we can move ahead."
- **Alignment:** These meetings not only help the organization stay focused and flexible, but they also keep team members flying in formation with each other and constantly mindful of how they are affecting each other. Expressed less positively, these meetings make it much harder for one person to "succeed" at the expense of teammates.



One more related point: Schedule enough time for a meaningful on-topic discussion. Time spent productively in goal review meetings will save a multiple of that later on. That may mean scheduling two hours and it may mean scheduling two days. When you are starting up, expect your meetings to take more time as everyone learns the routine. Later, as the team learns how to conduct these structured meetings, it will require less time.

### **#3: Sequence discussions around the leader's goals**

A goal review meeting is not your standard “howzitgoin” meeting, where each person updates everybody else on their respective activities. Goal review meetings are ultimately about the leader's goals and meetings are structured that way.

The leader has a handful of goals, the achievement of which is the point of the plan. The other team members have subordinate goals, which essentially *are the plan*. Discussions should be organized around the leader's goals. So, for instance, if the leader had four goals, then all the subordinate goals that contribute to the leader's first goal would be briefed first, followed by discussions about goals that contribute to his second goal. And so on.

Often, a subordinate goal will contribute to more than one of the overarching goals. In that case, the goal owner should brief it at the first opportunity. Example: one goal might contribute to über goals #2, #3, and #4. In that case, the goal owner should brief it when goal #2 is being discussed.

### **#4 Use a template for the goal readouts**

Here's another thing that will help corral a productive discussion: give the team members a briefing template to work from for each goal discussion. A good template will ensure that everyone answers the same basic set of questions about each goal and at roughly the same level of resolution. You will want the template to prompt responses to questions such as:

- What was the status of this goal last time I reported (red, yellow, or green)?
- What is it now?
- What are my key strategies for achieving this goal?
- What are my key strategies for preventing collateral damage?
- What is the “actual vs. plan” on milestones or key activities?
- What are the greatest risks (internal or external) to success?
- What are my risk mitigation strategies?
- Where do I need help from either peers or boss?\*

\* [Click here](#) to use our version of this in PowerPoint format.



## **#5 Use a facilitator to ensure productive collaboration**

The entire team, including the leader, should be able to focus their brainpower on the plan and its execution. The meeting process itself should be the concern of someone different: a meeting facilitator. A good one will not just waltz into the room with a flipchart and a smile. She'll work many hours before the meeting to wire it for success, will perform post-session documentation and follow-up, *and* will oversee the meeting process so you don't have to.

For example, you should expect a facilitator to:

- Ensure that there is cross-talk among the team members, not just a hub and spoke discussion with the boss.
- Keep track of – and post – agreements and decisions made last time, so you don't keep re-deciding the same thing.
- Pull quiet members into the discussion, especially when it's obviously a topic of interest or relevance to them.

Even if you must conduct meetings by teleconference or video teleconference, you will do well to lean on skilled facilitation to help the team make the most of its time together.

## **#6 Reflect progress visually**

This is going to sound like a nit, but it's not. During the meeting, as the story of your team's progress unfolds, have your facilitator or assistant build a *visual* display that tells the story. We like to create a large "goal map" that shows the top tier goals and their subordinate goals underneath. This can be shown electronically, but for face-to-face meetings a large paper wall chart works better. At the end of each goal status presentation, a status sticker – a red, yellow, or green dot – is placed on the chart next to the goal.

By slowly fleshing out this "you are here" map during the meeting, you show the team what they have accomplished as well as what remains to be done. This is a gentle, motivating exercise in accountability. If practical, keep this chart posted until the next meeting, where team members can see it.

Our military clients talk metaphorically about the importance of a "drumbeat," something that keeps everyone pointed in the same direction, and moving. Consider the goal review meeting as a simple drumbeat to help you and your team move quickly, adaptively, and in alignment with one another.

