

"Without execution,
vision is just another
word for hallucination."



Mark Hurd
Hewlett-Packard CEO

Execution, Execution, Execution

Presented by Erica Olsen
COO, M3 Planning

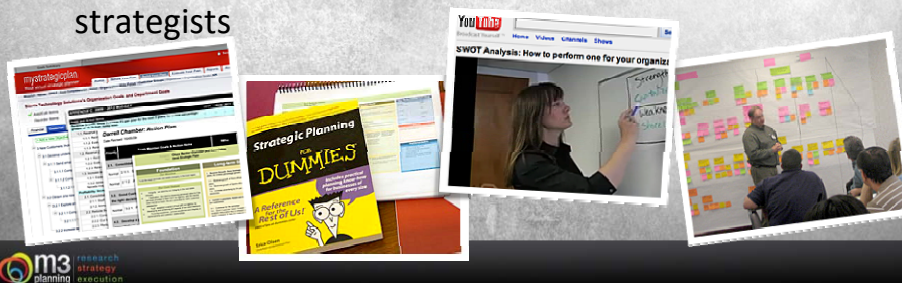


M3 by the Numbers

In the past three years we have...

- Managed 100+ strategic planning processes
- Deployed 800+ strategic management systems
- Built consensus and commitment with 3,000+ executives, managers, boards
- Empowered 1 million+ strategist & soon-to-be strategists

We love what we do!



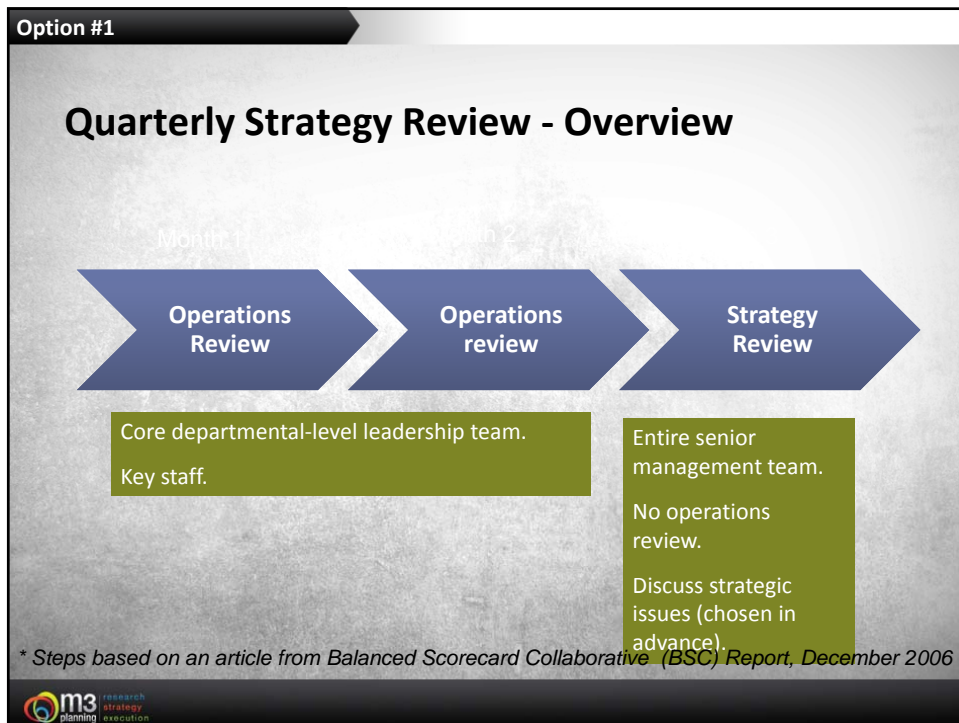
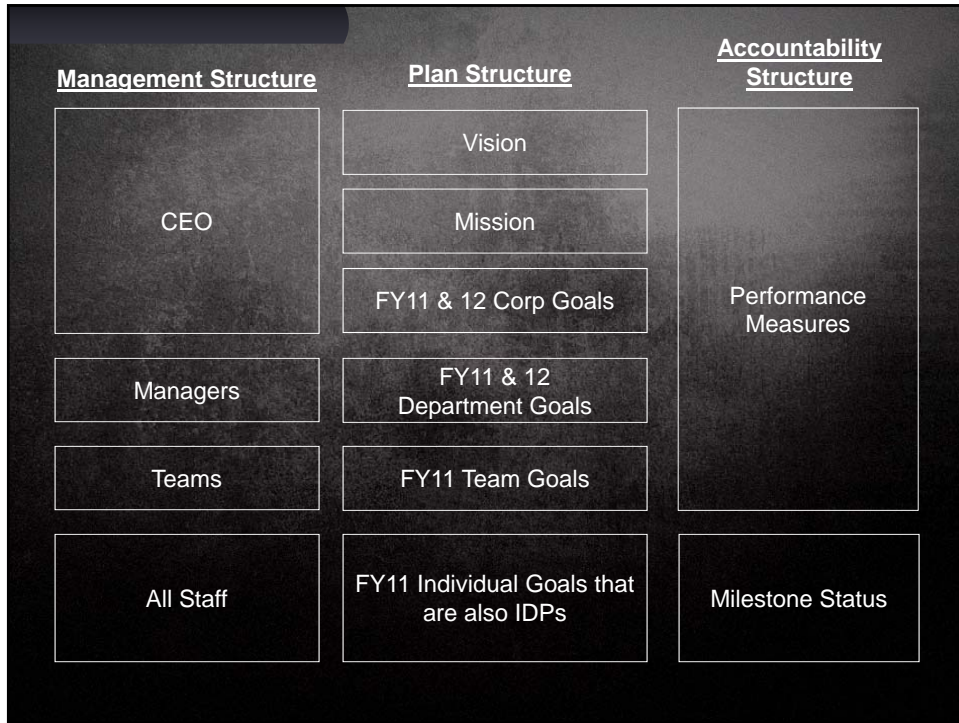
Agenda

1. Establish an execution schedule with correct frequency, tools and reports to support the process
2. How to effectively review your progress and track your key performance indicators using MyStrategicPlan
3. Set up business rules to help your team easily follow the process
4. How to run great monthly strategy review meetings

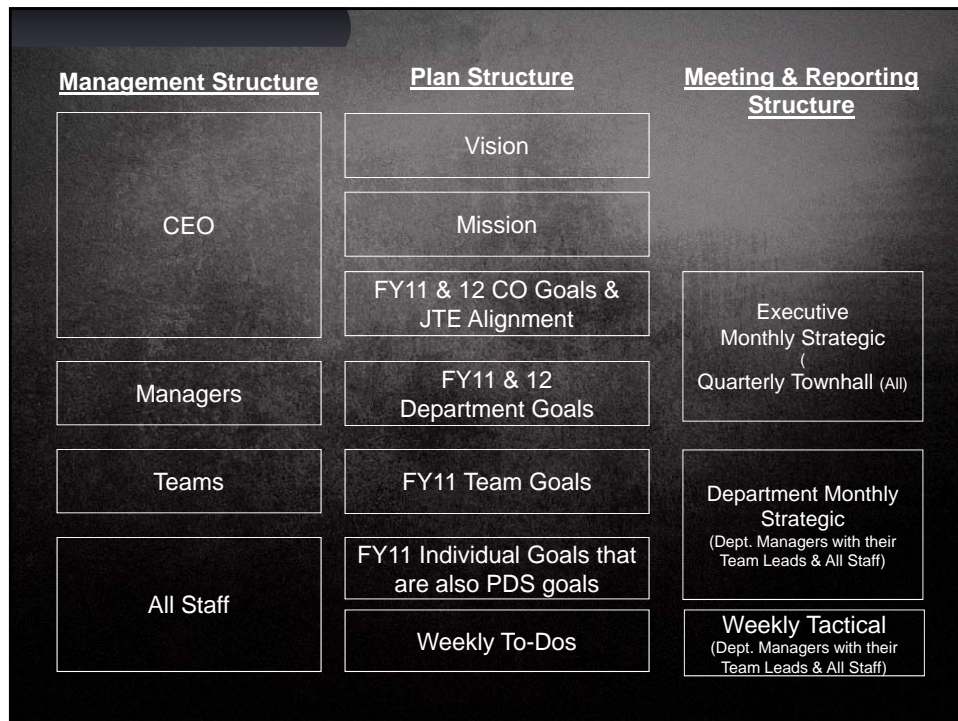
Establish your process, schedule and accoutabilities.

PROCESS & SCHEDULE









Distribute the execution management to everyone who is part of driving results for the organization.

HOW TO TRACK YOUR PROGRESS USING MYSTRATEGICPLAN



Knowing what you are tracking

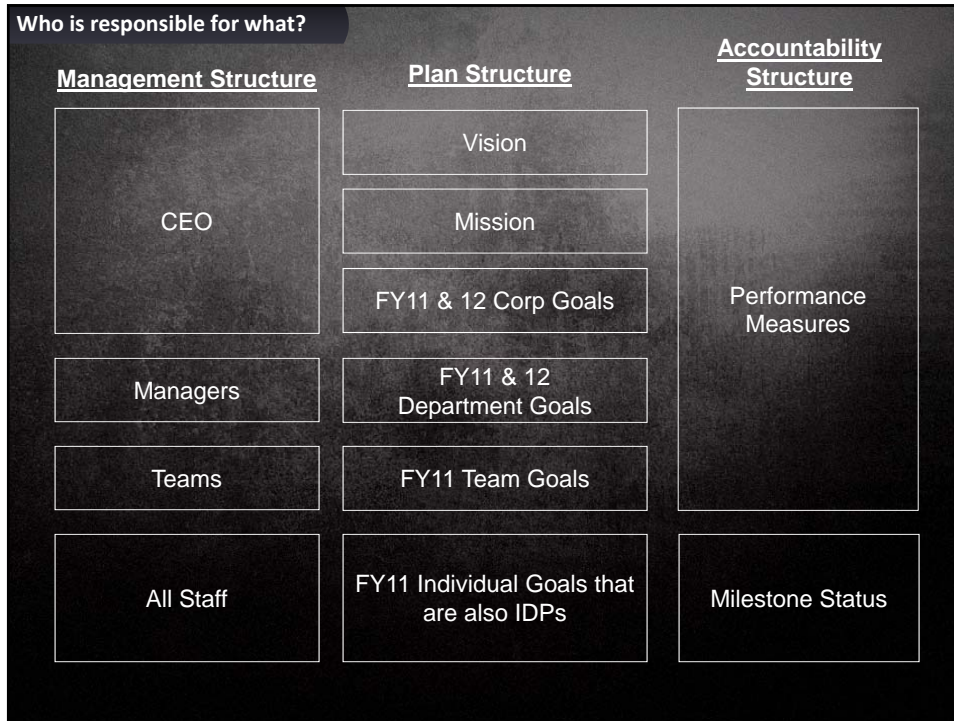
Qualitative Measures: Managerial estimation of status, stoplight icon, % complete – milestone status, tracked as point in time.

Quantitative Measures: Marked as Key Performance Indicators, tracked monthly.

- Sum: \$ in revenue, # of new customers
- Average: Profit margin %, number of returns, days on hand
- Highest number: Running totals
- Lowest number: Error rates, defects

- **Source:** Note the source for easy of updating
- **Frequency:** Identify metrics that are tracked monthly





Reports to Use

Strategy Alert → Strategy Review Meetings

MyStrategicPlan Settings:

- Set the department and team member strategy alert dates.
- Check out last login note

Priority	Team Goals & Team Member Goals	Who	Year End Target	% Completed YTD	Status	Start Date	End Date
Normal	1.1 Development of a new performance recognition program for unit, district, and council. (Impact Nat'l Obj 1, Goal 2; Council Ops Goal 1.1; Impact Nat'l Obj/N, Goal 2; Council Ops Goal 5.1) (% complete of new performance recog. program)						
Normal	1.1.1 Determine standards for a new performance recognition program for unit, district, and council	Council Organization Solutions	100%	70 %	●	1-1-2010	12-31-2010
Normal	1.1.1.1 Develop the program based on new standards.	Stan Wiley	100%	100 %	●	1-1-2010	3-31-2010
Normal	1.1.1.2 Administer assistance and support on the development of this program.	Myla Epley	100%	42 %	●	1-1-2010	12-31-2010
Normal	1.3 Populate the Council Impact Tracker tool with all Council visits in the last 3 years and encourage Area Directors to keep the information up to date. (Impact Nat'l Obj 1, Goal 1; Council Ops Goal 1.1) (% of effectiveness of tool based on the survey of AD)						
Normal	1.3.1 Populate the Council Impact Tracker tool with all Council visits in 2010 and encourage Area Directors to keep the information up to date.	Council Organization Solutions	100%	100 %	●	1-1-2010	12-31-2010

MY STRATEGIC PLAN

Cheat Sheet

MyStrategicPlan.com | 775.398.1577 Contact: Vanessa Lindeberg: vanessa@m3planning.com
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powered by **m3** planning

1. Getting started

- Go to: www.mystrategicplan.com
Login feature is at the upper right hand corner of the home page.
- Login
Username: Your email address Email Address:
Password: XXXX Password:

Tip: Change your password. Go to Account > My Profile

2. Add/Revise/Update Your Goals & Actions

- Go to Goals & Actions

Goals & Actions

• Create / Edit Goals and Action Items
• Assign Goals to your Team
- Add, revise, or delete what is assigned to you
(Hover your mouse over the item to see this toolbar)
Plus = Add Item, Pencil = Edit Item, Delete = Delete Item

+
✎
✖

Tip: Don't see all of these icons? That means you don't have permission to change the item. Here is how permissions work:

1. National Pillar (Admin)
- 1.1. Department Goal (Admin)
- 1.1.1. Team Goal (Team Leader)
- 1.1.1.1. Team Member Goal (Team Member)
- 1.1.1.1.1. Team Member Action (Team Member)

Tip: Don't see your whole plan? Click on the "View All" link in the middle of the screen

3. Update Your Status & Track Your Progress

- Go to Execute Your Plan > Track Goals & Actions
- Update Your Progress with two options:
 - ① Items where you are tracking progress with general status click (stoplight icon)
 - Select **current** status
 - Enter how **complete** you are to date
 - Add a brief **comment** on what has been accomplished or surface any specific concerns/issues. Note items that need to be escalated to your manager. Make sure to start it with the current date
 - ② Items where you are tracking metrics, click (key icon)
 - Enter the current month's performance metric
 - Need to see more months – go to Execute Your Plan > Scorecard

Tracking Status Key

<p>① ***** Update goal status</p> <p>② ***** Update KPI status</p>	<p>Start you are supporting</p> <p>Your item</p> <p>Your action</p>	<p>Complete</p> <p>On target</p> <p>Not on target</p> <p>Past due</p> <p>No status</p>
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Tip: Remember this is your managerial estimation of how you are progressing against your strategic initiatives. Don't write a novel or over think the data input. It is simple on purpose.

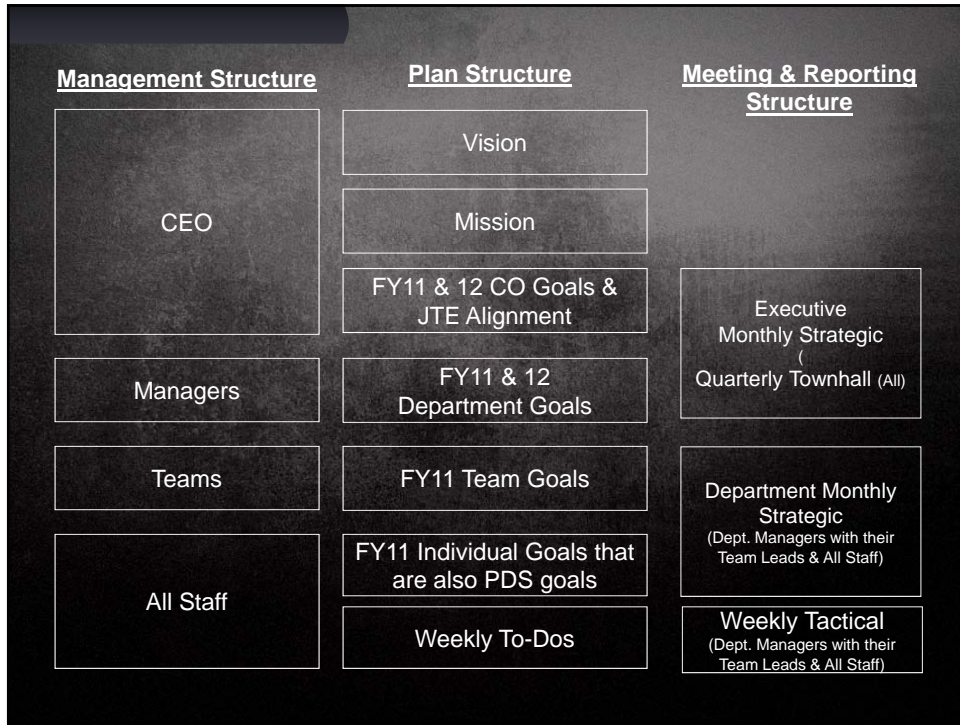
4. Reports for Your Meetings

- Report for Department Managers
Download your Executive Summary with Status to see item and progress.
- Report for Team Leaders & Team Members
Download your Action Plan report to view actions, status and comments

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

RUNNING A STRATEGY REVIEW MEETING

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Reports to Use

Purpose	Reports	Who
Executive Strategy Review Meeting	<ul style="list-style-type: none"> Executive Summary with Progress Dept. Action Sheet The Dash 	<p>CEO</p> <p>Department Managers</p>
Department/ Functional Strategy Review Meeting	<ul style="list-style-type: none"> Dept. Executive Summary with Progress Individual Action Sheets The Dash 	<p>Department Manager</p> <p>Individual Contributors</p>
Team/Individual Reviews	<ul style="list-style-type: none"> Individual Action Sheets 	Individual Contributors

Example Agenda

Strategy Session Agenda

Item	Responsibility & What to Bring
<u>Overview – Clarify the Agenda</u>	Department Mgr
<u>Corporate Scorecard Status</u> 1. Report on department KPIs – on and off target	Department Mgr
<u>Dept. Scorecard Status:</u> 1. Note accomplishments. 2. Report on status of your goals and measures. 3. Determine steps to get off track items back on track.	Team Leader Bring overall “team action sheet” and “department full plan with status”.
<u>Strategic Issues/Topics:</u> 1. Address any items that came up in the team updates. 2. Discuss (formally or informally) strategic issues in order of critical importance to the business. (Brief the issue, identify alternatives, suggest solutions, identify next action.)	Issue leader Bring issue briefing material
<u>Meeting Review</u>	Department Mgr



Your Checklist

- ✓ Get broad and diverse input from the beginning.
- ✓ Make the strategy personal – what is my role?
- ✓ Build the strategy to execute it. (who is doing what when)
- ✓ Publish a year-long calendar.
- ✓ Set up your strategy alert triggers.
- ✓ Identify the types of measures you need to use, the source of the data and frequency.
- ✓ Hold regular, consistent strategy reviews – decide on monthly or quarterly.
- ✓ Keep your plan up to date.



Upcoming Trainings

Strategic Planning 101

March 2 | 9 a.m P.T.

Setting Strategic Objectives and Cascading Goals

March 9 | 12 p.m. P.T.

Strategy Huddle™

March 23 | 9 a.m. P.T.

Execution, Execution, Execution

March 24 | 9 a.m. P.T.



APPENDIX

