



Applying discipline to implement your strategic plan & accelerate your organization

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Webinar starts at noon CT



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Please provide your feedback
at the end of today's presentation.



DANIEL WHITE

Senior Org. Development Consultant
Org. Development & Family Business

Expertise in strategic planning, leadership development, family business consulting and employee engagement.

Experience teaching masters-level courses in organizational development.



Objectives

- Understand how to prioritize your organization's goals
- Learn how to create the necessary structure and discipline for execution
- Learn how to maintain momentum on your plan



COMMON SYMPTOMS





Individuals

- New Year's resolutions
- Repeating to-do list items



Organizations

- Never accomplishing what needs to be done
- Same goals year after year
- Same discussions year after year
- Being pushed around by the market rather than being proactive



POLLING QUESTION #1

Please answer for continuing education credit

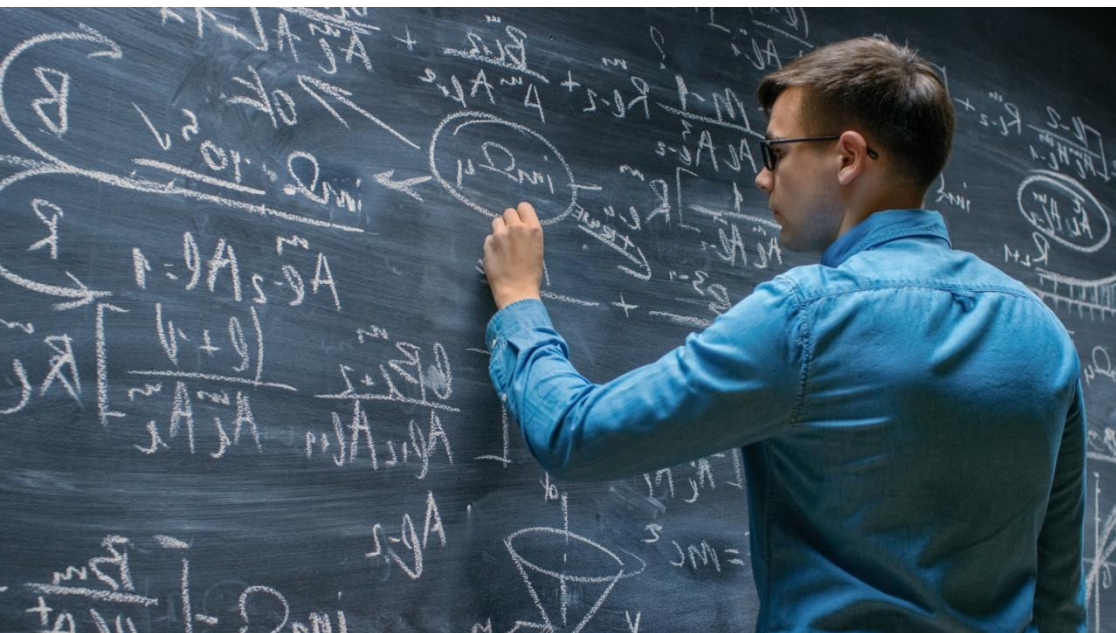
Statistics

- 60-90% of organizations fail to successfully implement their strategies



SOLUTIONS





NOT ROCKET SCIENCE

Plan

1. What is the end goal?
2. What will get us there?





BEGIN WITH THE END IN MIND

FOCUS

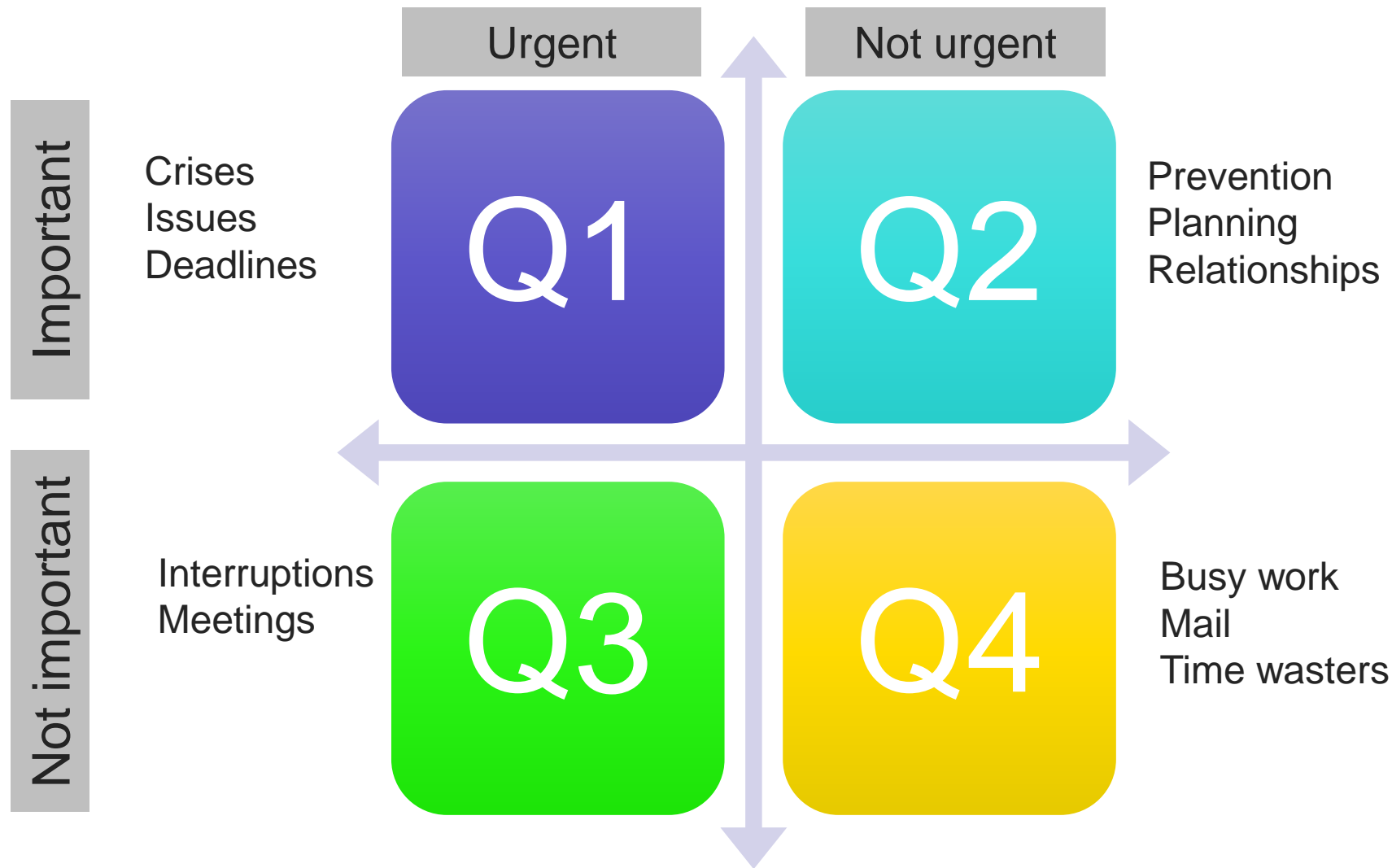


POLLING QUESTION #2

Please answer for continuing education credit



Put first things first





LIMIT YOUR GOALS

Clarity

- What are the goals?
- Are they S.M.A.R.T. goals?
- What is the deadline?
- Who is the champion?

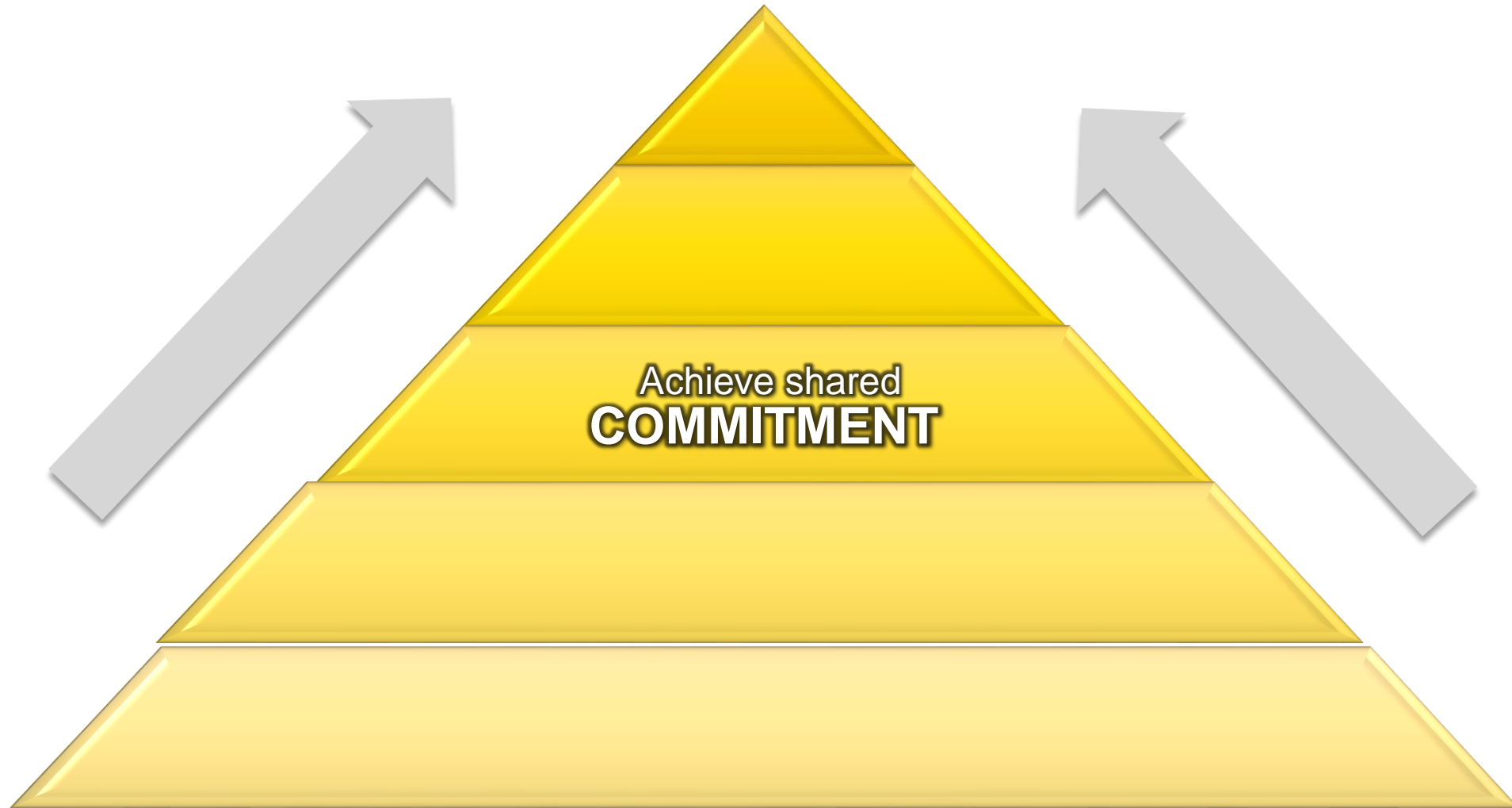


COMMITMENT





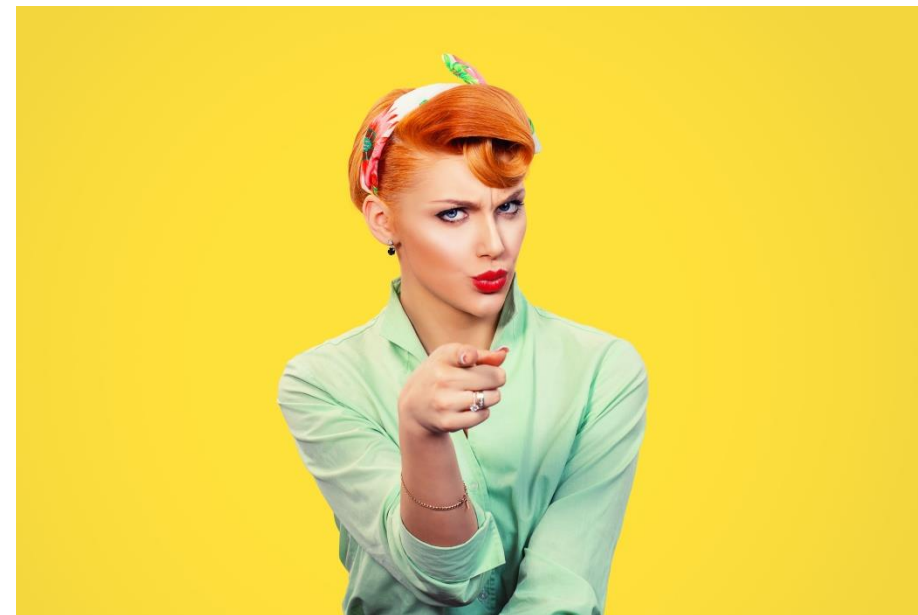
Five dysfunctions of a team





BUY-IN / INVOLVEMENT

ACCOUNTABILITY

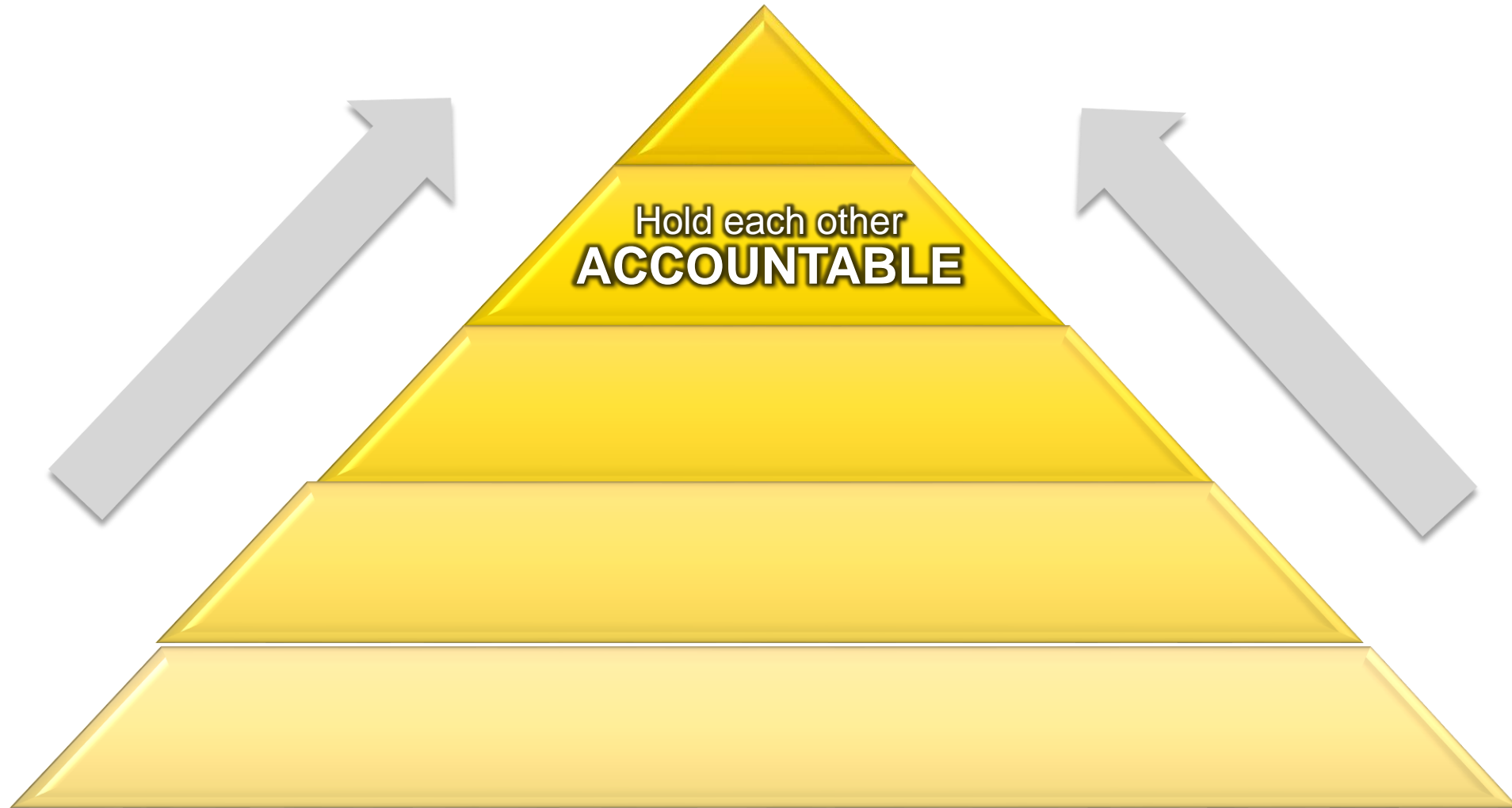


Review

- Progress on goals & rocks
- Key metrics



Five dysfunctions of a team



POLLING QUESTION #3

Please answer for continuing education credit

Who holds others accountable?

- The TEAM





**OUTSIDE PRESSURE
CAN HELP**

GET IN A RHYTHM





CONTINUING MOMENTUM

Habits

- It takes 21-66 days to create a habit
- What are you doing to create the right habits in your organization?





Level 10 meeting

- Weekly
- Brief report
- Accountability
- Solving issues





Creating space

- Space for follow up
- Space for attacking your “rocks”
- Space for “big picture” thinking (quarterly/yearly)



EXAMPLE #1

Entrepreneurial Operating System



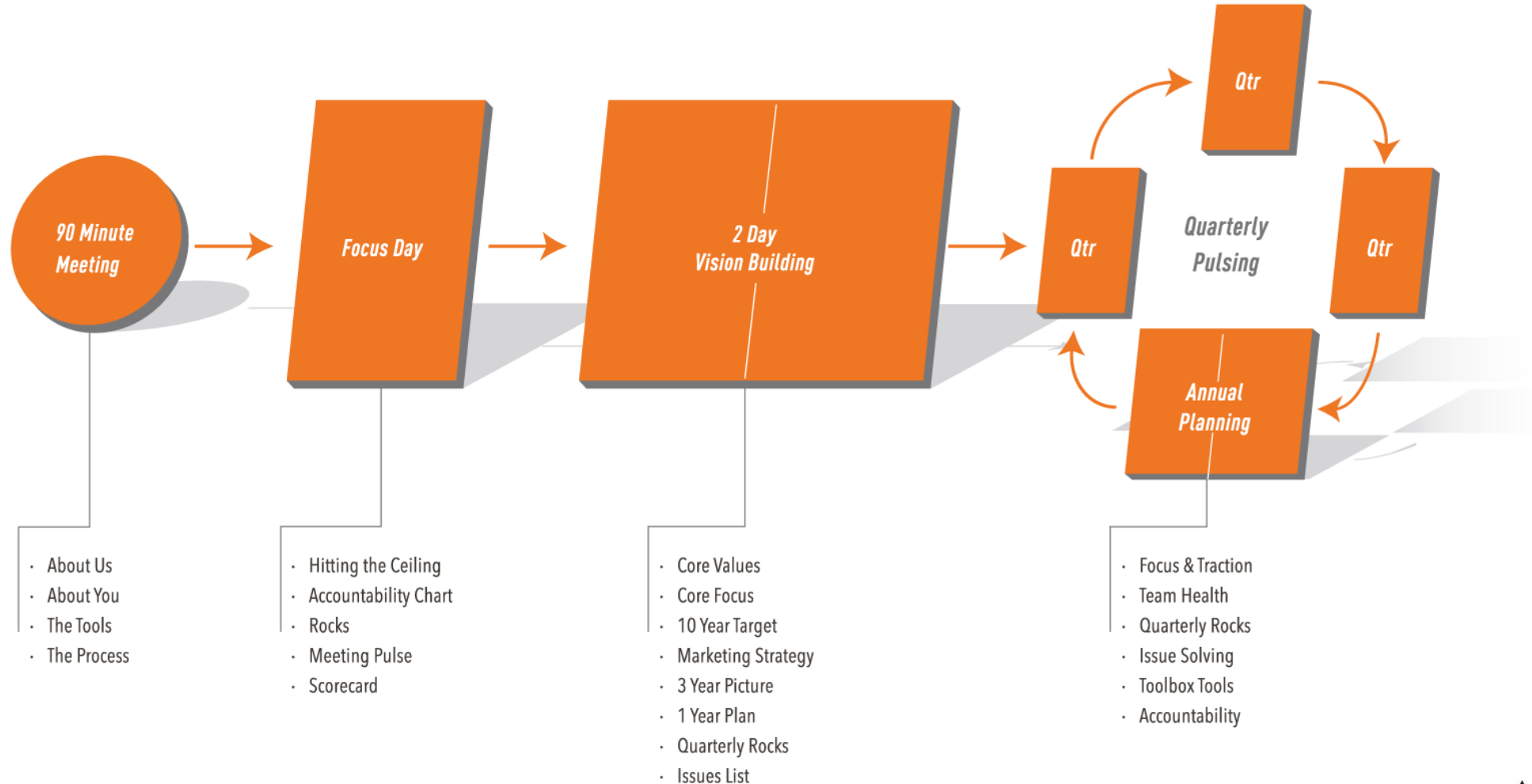


What is EOS?

- **Vision**—getting everyone in your organization 100% on the same page with where you're going, and how you plan to get there
- **Traction®**—instilling focus, discipline, and accountability throughout the company so that everyone executes on that vision—every day
- **Healthy**—helping your leaders become a more cohesive, functional, healthy leadership team



The EOS process



EXAMPLE #2

ACME Organization





ACME Organization

- Develop three-year plan with small goals and scorecard
- Executive team meets monthly to review progress
- Meet annually to refine goals



**“I’M NOT THE DECISION
MAKER...”**



What if you're not the decision maker?

- Start where you are
- Ask the right questions & gain clarity for yourself
- Follow through



REVIEW

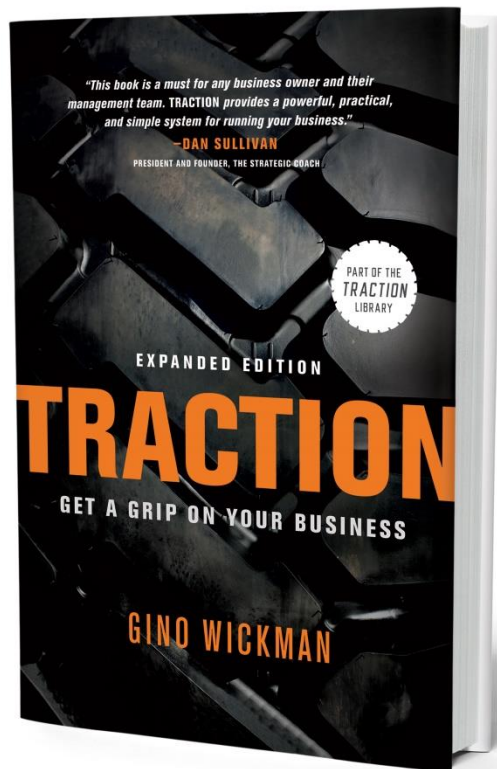


Review

- Plan
- Focus
- Commit
- Hold accountable
- Get in a rhythm



Useful resources



- *Traction* by Gino Wickman
- *The Seven Habits of Highly Effective People* by Stephen Covey
- *The 5 Dysfunctions of a Team* by Patrick Lencioni



Useful resources

FINANCIAL											
INSERT METRIC GRAPHS HERE	Action Plans										
	Action Item						Champion		Review Date		
	METRICS										
Measure						2017 baseline	2018 baseline	2019 ytd	% of goal	2019 goal	2020 goal

- Free tool: scorecard
- Goals, deadlines, champions & metrics on one page

POLLING QUESTION #4

Please answer for continuing education credit



Thank you for attending



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