



Dear June,

Eyes Wide Open

Since launching **Executive Advantage**, a mainstay of our service offerings has been organizational strategy support. In fact, we've been called upon to work with groups both near and far -- as close as our home base in metropolitan Washington, DC and as far away as Hawaii (and, what a sacrifice that was!).

Naturally, when most people think *strategy* or *strategic planning*, the basics come to mind -- mission, vision, values, goals, and action steps. Can't you see it now, a vision of a dry process that simply must be endured in order to satisfy a board or CEO mandate? However, in addition to building in some fun (a must-have), one factor that often is truly enlightening for the groups with which we work is what they can uncover about their organizations, and themselves, as a result of the preparation that we encourage leaders to undertake before they ever sit down to develop or revise strategy. That is, there's much to be learned ... if they are willing to enter the process with eyes wide open.

In this month's **EA Insights**, we take a look at gathering and using data about an organization in order to plan for its future. Although this month we focus on performing an unbiased assessment from an organizational perspective, know that a similar process is extremely helpful in anticipation of setting or updating personal direction and strategy as well.

Happy Thanksgiving to you all!

All the best,

June

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Developing Strategy by Starting with Reality

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It's that time. Many organizations are about to pause to strategize for the upcoming year. *Here's what we have to do. Here's what we want to do. Here's what we wish we could do.* You know the drill.

Now, be honest. Just how much in *last year's* plan did you actually accomplish? And, don't hide behind "the economy." Not everything on that "to-do" list you created was dollars-driven.

So, if you typically find yourself with undone items, is it possible to plan in a way that boosts the likelihood that you will accomplish what you set out to do? If you've been an **EA Insights** reader for a while, you know that the answer is a resounding "yes." [Check out the Strategic Thinking series -- "[Finishing Well](#)" and "The Top 10 Reasons Plans Fail ([Part I](#) and [Part II](#))".] For now, though, let's highlight one important tactic for achieving greater strategic results; that is, developing strategy by

starting with reality.

Think about it this way. One aspect of strategic thinking is directional; that is, examine where the organization is going and how it's going to get there. However, an equally important aspect of strategic thinking is operational; that is, consider what's working, what's broken, and what could use just a little tweaking to get to the next level. To plan practically and effectively in either of those spheres, it's essential for the leader or leadership team to step back and look critically at what is actually happening within the entity. The goal isn't to cast blame or find excuses; the intention is to understand the landscape so that planning can be based in reality, which then makes progress more possible.

Many leaders have an idea about where the entity stands, and they rely solely on this anecdotal information to support their planning. By doing so, though, efforts to assess status and set strategy often are based on perception (and management perception, at that), and not on actual *data* or a broader reading of the environment. The result is that, limited to that narrow view, it's difficult at best to plan realistically for the organization's future.

On the other hand, at **Executive Advantage**, we've found that planning efforts are enhanced when they are undergirded by two levels of information about the organization.

Tier 1 - Management-Level Self-Assessments

A management self-assessment is a critical first step. The self-assessment

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"Quotes"

"Treat employees like partners, and they act like partners."

~Fred Allen

"I have lots of sources of information about what's going on at the company. I think I have a pretty good pulse on where we are and what people are thinking."

~Steve Ballmer

"Few people even scratch the surface, much less exhaust the contemplation of their own experience."

~Randolph Bourne

"I have never yet seen any plan which has not been mended by the observations of those who were much inferior in understanding to the person who took the lead in the business."

~Edmund Burke

"Before beginning, plan carefully."

~Marcus Tullius Cicero

"As a general rule, the most successful man in life is the man who has the best information."

should permit the leader or leadership team to present impressions regarding the organization's status, strengths, and challenges. Through questions soliciting both quantitative and qualitative data, the self-assessment should escort leaders through a thought process that covers at least four key capacity areas:

- *Leadership Capacity* (e.g., mission, vision, values, strategy, goals, board/organizational governance, executive/owner experience, and effectiveness)
- *Adaptive Capacity* (e.g., formal strategic planning, performance measurement, evaluation and organizational learning, product/ service relevance and growth, new product/service development, client needs, partnerships and alliances, and community presence)
- *Management Capacity* (e.g., management team and staff composition; management and staff dependence on the executive/ owner; shared references and practices; goals and performance targets; organizational processes; decision-making; knowledge management; inter-functional coordination and communication; human resource planning generally; and recruiting, development, and retention of management)
- *Operational Capacity* (e.g., revenue generation, financial planning/ budgeting, financial operations management, quality, production, cost-effectiveness, turnover, safety, sales and marketing, staffing levels, communications strategy, technology, equipment, facilities, technical resources, and management of legal and liability matters)

Through the management self-assessment, leaders should generate a clear, candid picture of the organization from their perspective. This yields important information to begin the process of appraising current status, identifying areas of effectiveness to be leveraged for greater success, pinpointing challenge areas for ongoing focus, and setting benchmarks for continued measurement.

Tier 2 - Staff-Level Assessments

It is not unusual or inappropriate for leaders to assess an entity's status, but note that such an analysis only provides one viewpoint. If you want a full view of how the organization is doing and where opportunities exist, seek input from staff members also.

Using a safe and confidential format, find out how staff members understand and view the organization's direction, their roles in accomplishing those goals, and the various related issues connected to organizational success. Consider staff impressions of the company in areas, such as:

- Their views of and confidence in leadership
- The efforts around strategic planning
- The company's customer and market focus
- How the company measures, analyzes, and uses information
- How people (your human assets) are valued, managed, and grown
- The way in which processes are developed, communicated, followed, and changed
- How the organization is performing, and how it approaches improvement efforts

Such information can be priceless for leaders. It spotlights where there is organizational misalignment -- those *disconnects* that can impact results, even in the face of well-designed "top-down" strategies and solid infrastructures. It pinpoints areas that are poised for strategic attention, whether it is to address a matter with an external or an internal impact (or both). And, it offers tremendous opportunities for communication with staff --about what was shared, what was learned, how it will be used, and ultimately how it helped to bring about improved results.

Finances... Customers... Staff... Growth... Do you know where your gaps are?



Whether you operate on a calendar year or another fiscal year, *now* is a perfect time to do a status check of how you'll end 2010 and move into 2011.

Let **Executive Advantage** help you find your gaps. Contact us today to schedule your Annual Organizational Status Check.

This 4-session program is designed for organization executives and business owners. We'll help you to:

- Re-examine your mission, vision, and values
- Assess the current status of your 2010 business goals
- Evaluate how your organization's operations and people management have helped or hindered your ability to reach your goals
- Uncover possible disconnects between leadership and staff understanding of your mission, structure, approach, and business goals
- Map out areas for attention in 2011, and begin to decide how to address them

Call us at 301-280-5950 or contact us online at www.execadvantagellc.com so we can talk about how to make this happen for you.

2011 really is right around the corner. Are you ready?

About Executive Advantage

At **Executive Advantage**, we are committed to providing results-based business and management consulting, leadership development, and coaching support. We partner with business leaders to build healthy, well-functioning organizations, where goals are met and people thrive. We also partner with individuals to create professional (and personal) lives with clearer direction, improved results, and greater balance.

To learn more about **Executive Advantage**, contact us **online** or at **(301) 280-5950**.

View our profile on [LinkedIn](#)

~Benjamin Disraeli

"Checking the results of a decision against its expectations shows executives what their strengths are, where they need to improve, and where they lack knowledge or information."

~Peter Drucker

"The information is in the people, not in your head."

~Edward T. Hall

"What we actually learn, from any given set of circumstances, determines whether we become increasingly powerless or more powerful."

~Blaine Lee

"Just the act of listening means more than you can imagine to most employees."

~Bob Nelson

"There are no secrets to success. It is the result of preparation, hard work, and learning from failure."

~Colin Powell

"Nothing happens quite by chance. It's a question of accretion of information and experience."

~Jonas Salk