



Dear Friend,

Latin Class

Like just about everyone reading this message, I learned a language (other than English) in high school. However, unlike most people reading this message, my language of choice was *Latin*. Yes, I was one of the geeks!

Latin class was, by no means, overflowing with students. Year 1, there were 11 of us. In Year 2, four brave souls stuck it out. And, well, by Years 3 and 4, let's just say...I got to know the teacher very well.

Anyway, Latin, for first and second year students, was taught by a lovely, though tough, nun named Sister Helen Jean. Sister Helen Jean knew me well...too well, if you ask me. You see, although my grades in her class, and all others, were very good, *she* thought I could do more. (*Did I mention that she was my freshman homeroom teacher too and, as such, had access to all that I was doing?*) Sister Helen Jean constantly encouraged me to dig deeper, push harder, and discover more. I, on the other hand, wanted to devote only enough time to get the grades I desired. (*I was a geek, but I did want to have SOME fun!*) We clashed constantly, in a lovingly, playful way, over the need for me to grasp a good foundation of knowledge and not take shortcuts. And, I must say, though I resisted, seeds were planted and took far more root than I thought at the time.

Today, much like Sister Helen Jean many years ago, I'm on the encouraging side of the table when it comes to knowledge. Just ask Executive Advantage clients! My constant exhortation is for them to learn as possible, and to be as clear as possible, so that they can reach as many of their goals as possible.

And, it is in that spirit that I invite you to join me for this month's edition of **EA Insights** as we take on the first of three installments on successful strategy. As you'll see, at the core of success is *knowledge*. So, come with me as, together, we examine the impact that knowledge has on your strategic thinking efforts.

Somehow, I get the sense that Sister Helen Jean would be pleased.

All the best,

June

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Successful Strategy: Prep to Plan!

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A lot of the work we do through **Executive Advantage** involves strategic thinking. Whether the assignment is with an organization looking to set direction at the company-wide or department level, or the engagement is with an individual seeking to outline a professional or personal path forward, strategic thinking typically is involved.



Interestingly, the challenge for many people is not in recognizing and valuing the need to be strategic; they get that. Instead, the obstacle often arises in following through on a disciplined process so that effective strategic thinking actually can occur and the resulting plan actually can be implemented.

And, that's the heart of **Executive Advantage** work! It's helping people move from knowledge to strategy and from strategy to action.

However, successful strategy must start with *knowledge*.

Unfortunately, the preparation -- the knowledge phase -- can be overlooked in the strategic thinking process. Strategic thinking that starts with "*Okay, what do I/we need to DO to move forward?*" will have questionable success. The downfall in that approach rests with its failure to grapple with two necessary inquiries that precede the "DO" question.

Prep Question 1: What am I (what are we) trying to accomplish?

This is the personal or organizational mission/vision question. There's an old saying: If you don't know where you're going, any road will take you there. How true that is! I can't tell you how many times I've sat with people in a goals review session, and they share wonderfully crafted strategic plans (or, for individuals, a long, elaborately prepared list of goals). Yet, when asked to boil what they've been trying to accomplish down to 1 - 2 sentences, I get the deer-in-the-headlights

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"Quotes"

"We weren't prepared; we didn't have the background information and we didn't have the collateral information. In many cases, you can do more damage than good if you don't do your homework."
~Dan Allen

"Part of the reason of the survey is to look for current information on what people are doing, what their risks are and what their level of knowledge is."
~James Allen

"[W]e wanted to ... make sure we were ... providing indicative, realistic information to make sure that everybody understood what was happening[.]"
~Patrick Campbell

"Arriving at one goal is the starting point to another."
~John Dewey

"I've got clear goals again, and I'm looking forward to playing. I've got some energy again."
~Ernie Els

"Peak performers develop powerful mental images of the behavior that will lead to the desired results. They see in their mind's eye the result they want, and the actions leading to it."
~Charles Garfield

"[Y]ou start with what you know and work your way back."
~Cheryl Hamann

"Effective leaders help others to understand the necessity of change and to accept a

book.

These folks haven't come to grips with a fundamental fact. That is, it's essential to decide on a desired outcome at the outset. A lack of clarity about desired outcome is akin to building a house on sand. Seriously, if that's what you're doing, prepare to be unsettled!

How does shifting sand play itself out in personal or organizational planning? Here are the most frequent symptoms:

A long, complicated recitation of desired *outcome* (that is, an inability to provide a clear, succinct statement of the ending);

A hodgepodge of goals (that is, goals that go in a variety of directions and lack cohesion); and/or

Fits and starts (that is, movement in one direction for a while, followed by a series of mid-stream changes, and very little to show for all of the effort).

Is this you? Test yourself. Look at your current plan. If you find yourself and/or your team, division, or organization guilty of any of the points above, you're probably dealing with a rocky foundation. And, I'd bet your strategy efforts are suffering as a result.

Prep Question 2: What's our starting point?

Just as too many strategy efforts neglect planning with the end in mind, too many strategy efforts also neglect planing with a good sense of the starting point. I often joke with clients that I can offer any number of great plans to get to Los Angeles, and any one of them would be well-crafted and sensible. What is likely to set these fantastic plans apart, though, at least in the first instance, is my starting point! The route I take to LA is going to look very different if I'm starting in Maryland than it would if I were launching my trip from San Francisco. So, grasping the point from which you're beginning is critical.

For a strategic thinking effort to yield success, the starting point -- the current state -- assessment should meet three core criteria. It's important to consider where you are at the outset:

- In a Realistic Manner
- In an Unbiased Manner
- In a Nonjudgmental Manner

By **realistic**, I mean gathering data and input that is genuine. This is not the time to cherry pick what you'll use. Nor is this the time to be lazy and only consider what's easily and readily available. The gathering and use of realistic information requires you to do a little leg work and to reflect on input from a variety of sources in order to develop an accurate assessment of the present state of affairs.

Starting point information also should be **unbiased**. If you've ever watched the audition rounds of *American Idol*, you'll know what I mean here. How many times do you see a young person, who clearly does not have singing as one of his or her gifts, not only singing on television, but heartbroken at having been rejected? And, invariably, who else do you see in the mix? It's mom or dad, cajoling the tearful contestant with a "Baby, these people don't know talent! I think you're wonderful!" These instances reflect a parent, who is far from unbiased. In hearing with the heart, rather than the ear, the biased parent has set that believing child up for a severe fall. And, in the process, he or she has contributed to the delay or rejection of realistic dreams, while the child has built plans around the wrong hopes. We do something similar, though (I hope) not as public, when we pin our planning efforts on data and information that is biased.

Finally, the background for strategic thinking must be **nonjudgmental**. You won't get people to open up and honestly communicate the information you need in order to assess how to move forward, if they're afraid. What's coming your way may be hard to receive...but, you'll remain on shaky ground and continue to wonder why your planning efforts never really seem to...click, if you're unwilling to accept the good, the bad, and the ugly. Also, the when the info comes in, your #1 priority should not to find the person to hogtie. It's not about casting blame; it's about learning so that you can develop the appropriate plans in order to get closer to that desired outcome.

So, let me ask you. How *are* you prepping, or how *have* you prepped, for strategic thinking for yourself or your team? If you're serious about truly closing the gap between where you are now and where you'd like to be, you can't neglect these critical initial steps!

With that in mind, why don't you let Executive Advantage help you prepare? We'd be honored to work with you to clarify your desired outcome(s) and to grasp your starting point so that your planning can rest on a solid foundation. [Contact us today](#).



And, don't miss next month, as we examine the next part of successful strategy -- strategy development.

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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.

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common vision of the desired outcome."
~John Kotter

"To preserve and improve (these properties) is the desired outcome. We want [our] neighborhoods to be attractive and welcoming. The primary focus is to improve the quality of life."
~Wayne Kramer

"[Y]ou learn that you have to set the direction.... You always have to adjust, but you always have to have a starting point, as far as a direction, a game plan. It all ties together."
~Marvin Lewis

"I can see the advantage because this gives you a clear direction of where to go."
~Bob Myers

"These are very serious students who have a clear direction and know what they want to do and where they want to go in their lives."
~Scot Roskelley

"For the past two and a half years, our organization has focused on strategy. We had to know where we were going before we figured out how we would get there."
~John Webb

"The expectations are fluctuating day by day, so there's no clear direction at the moment."
~Masafumi Yamamoto