4

Aligning Projects With Strategic Intent

The nice thing about not planning is that failure comes as a complete surprise rather than being preceded by a period of worry and depression.

—Anonymous

Maybe you've seen the classic cartoon illustration depicting the joining of two turn-of-the-century railway lines—one stretching hundreds of miles from the West and the other stretching hundreds of miles from the East. Gathered together to celebrate, civil engineers, draftsmen, and linemen from both companies eagerly anticipate the great event of joining the last 30-foot section. But as the final rails are put in place, everyone is astonished and stopped dead in their tracks to see the tracks off-kilter by a ponderous 15 feet!

The team immediately scrambles to figure out where they got derailed. The draftsmen are seen arguing over their blueprints; the engineers hastily work their slide rules and transits; and the lineman crew bosses scratch their heads in bewilderment. How in the world did this happen? The argument continues, but one truth remains: Two sets of tracks stretch into the distance as far as the eye can see—but the twain shall not meet that day.

This disastrous railroad track metaphor exemplifies the "strategic disconnect" that often happens in organizations. One set of tracks represents the Strategic Plan built by the CEO and the executive leadership team. The other set of tracks represents the projects and processes intended to support the Strategic Plan. But as the cartoon shows, things don't always line up despite good intentions and smart, hardworking people on both sides.

This chapter explores ways to align your projects with strategic intent so you stay on track. We'll supplement the ideas introduced in the last chapter with a few other best-practice strategic planning concepts that can be used at any organizational level.

While the LogFrame is widely used on stand-alone projects, it adds particular value when applied to portfolios of projects. Even if your concern is with single projects, these ideas will help relate your project with your organization's larger themes.

To understand why disconnects happen, and how to reduce them, we will first briefly explore several aspects of strategy. I promise to keep this short because discussing strategy formation, cascading, and portfolio management can put even the most caffeine-buzzed person to sleep if the subject lingers too long.

Then I'll describe a "quick and clean" unit-level strategic planning process, and share how a client applied these concepts. As this case study will prove, time invested in smart early planning can produce breakthrough performance.

Strategy in a Nutshell

Conduct an online search at Amazon or Barnes & Noble for "strategy books" and you'll discover several thousand different publications. There are nearly as many different strategy variations as there are consultants who write books on the topic. But on the broadest levels, all the experts agree that strategy is what connects the present to the future.

Strategy is the particular means chosen to get from where you are to where you want to go, selected from multiple possibilities and reflecting your vision, mission, and values. An overall Strategy (big "S") usually consists of multiple strategic initiatives (small "s"), which are executed through programs, projects, and tasks.

While no list can be exhaustive, there exist some progressive and generic strategies with broad application. Several are, in fact, umbrella categories under which multiple specific strategies could be created. Consider how you might incorporate some of these progressive strategies for the twenty-first century:

- Flexibility (Southwest Airlines/Dell)
- Speed (FedEx)
- Horizontally Integrated—Related products/by-products (i.e., Arco's AM/PM Mini-Marts and ethanol plants)
- Networks and Alliances (Apple/IBM or Japanese Kiertsus)
- Value-Added—More Value for the Money (larger cereal boxes)
- Environmentally Improved/Green Products (i.e., solar heat; toxic waste clean-up)
- Mass Customization (Toyota)
- Simplification (Honda value analysis)
- Six Sigma (Motorola)
- Organizational Learning (GE, Peter Senge)
- Employee Morale/Family Benefits and Part-time Focus on Work (many firms)
- Management and Leadership Practices (GE)
- Outsourcing and Cottage Industries (many firms)
- Core Competencies — People, Technology, etc. (Sony)
- Market Tie-Ins/Preferred Customers (American Airlines)
- Cause-Related Marketing (McDonald's)
- Data Driven Marketing (Financial Services)
- Alternative Delivery Channels (Internet, Cisco)
- "Experiences " (Planet Hollywood, Adventure Travel)
- Value Chain Management (Wal-Mart)
- Social Networking (LinkedIn, Facebook)

Corporate strategy typically begins at the top and cascades down through strategic business units (SBUs) via a process of collective conversations that engage stakeholders in off-site retreats, negotiations, and meetings of all sorts. At the end of that process, the

corporate strategy ends up as collections—or portfolios—of strategic initiatives. Programs and projects become the change vehicles for executing strategic intent.

My clients have applied LogFrame concepts in many different creative ways to support their organization's strategic and operational planning process. The concepts help formulate and document these vital conversations in a meaningful way. Use them as an adjunct to your existing strategic planning system.

Is Your Strategy Boxing You In?

But what determines whether a project is strategic or not? We recently reviewed a set of planning documents from a company that shall remain nameless. Believe it or not, they handled this determination with a simple check box on the proposed project form:

Is this a strategic project?

☐ Yes
☐ No

No further explanation was required or requested! But how did the proposer decide? Ouija board? Coin flip? Vested interest? Or was it solid analytic reasoning? My hunch is that this simplistic way of deciding boxed their organization in somewhere along the line.

My belief is that until you can describe how your project contributes to strategic intent—in clear and simple language—the chances of being right-on will be further off than those misaligned railroad tracks.

Fortunately, you now have a vocabulary for demonstrating clear connections—If-Then thinking. The language of strategic hypotheses offers a way to go beyond the jargon to show how proposed project Outcomes percolate up the chain and connect to a strategic Goal.

Try this: Take pen and paper and sketch out the logic for one of your projects. If you can't describe the If-Then links, you probably don't have a demonstrably strategic project.

As we'll soon see, Purpose is the lynch pin that connects project Objectives to strategic business Goals.

Juggling Portfolios and Programs

> Project management is like juggling three balls—time, cost, and quality. Program management is like a troupe of circus performers standing in a circle, each juggling three balls and swapping balls from time to time.
>
> —G. Reiss

Let's now turn to the way that corporate strategy is moved into project strategy via portfolio and program management.

Portfolio management involves screening candidate projects through a series of phases and gates, and funding those that appear to deliver the biggest benefit boom for the buck. In well-run companies like GE, it's a systematic and integrated system with smooth handoffs from corporate to business units to departments and functions. More commonly, it's an imperfect and choppy process with plenty of chances to drop the ball.

Admittedly, it's not always easy to align strategy elements with responsible organizational units. Nor is it simple to identify who owns and who supports what Objectives, as many involve multiple players.

Bits and pieces of overall strategy may be scattered among a variety of planning processes and documents, which miss the connective tissue. The logical fit that exists gets lost among the verbiage.

These plans, however, are seldom summarized in a single, succinct project strategy document. Planning may be ad hoc or use systems that are heavy on paperwork, but short on common goals or common sense, where confusion reigns. Many such systems roll on with a life of their own and serve the organization's bureaucracy, but aren't relevant or useful to line and project managers.

Some progressive organizations have added a one- or two-page LogFrame summary to long project proposals as a quick way to communicate intent. Others have added LogFrames into their Phase and Gate process.

There are better ways to cascade. Better ways would make the underlying logic crystal clear. If-Then language is well suited to do just that.

Grouping Projects by Common Purpose Themes

Any set of strategies involves multiple Objectives that can be set out in hierarchies that come together in some sort of a logical fashion. If they don't come together, that's an early warning of trouble coming!

As we saw in Chapter 2, Objectives Trees are a visual thinking tool which use If-Then logic to help us describe, develop, and test strategic relationships. These concepts can apply in multiple ways that are beneficial.

One example of using Objectives Tree at the program level by grouping is to group similar Purpose statements together. This greatly contributes to clarity in complicated situations.

Figure 4.1 shows a generic model in which the vision is supported by three major Goals, each with multiple Purposes. The case study below describes the practical power of "Purpose statements" to enhance corporate performance.

AEGON USA, a Fortune 500 company, is a major insurance holding company. After they acquired Transamerica and several other large insurance companies, they found themselves with overlapping

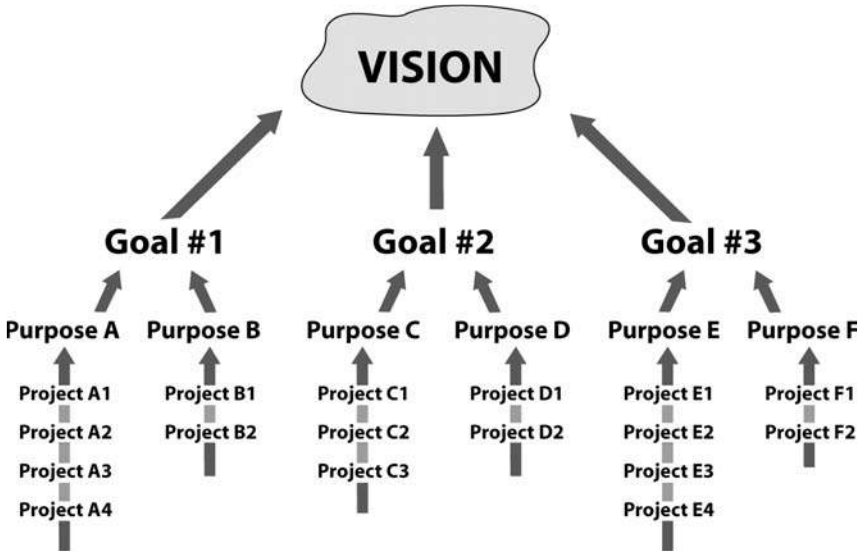

FIGURE 4.1 Objectives Tree Linking Projects to Vision

Technology Services divisions that they then needed to consolidate to reduce redundant services. AEGON identified 120 IT projects under way in several different locales, but the project plans lacked clarity and alignment with central strategies. Their geographically dispersed team members needed to collaborate, but their roles were unclear. After we trained their top 100 IT staff members in LogFrame planning methods, they put the tools to the test on their portfolios. In doing so, they discovered that most projects lacked clear Purpose statements—the *why* of the projects was not obvious.

After clarifying several Division Goals, a handful of common *Purpose themes* were identified. At that point, 120 projects were merged into 30 more meaningful projects that integrated the company's Goals with one another. Cross-connecting project teams were then organized around these Purpose themes. Working on larger puzzle pieces enabled them to standardize software, streamline help desks, consolidate overlapping functions, and improve security. As a further result, communications improved, costs dropped, and service availability increased.

Every strategic thrust can be described and linked both up and down using If-Then language. This type of analysis can augment Goal cascading and portfolio management. When cascading is done by organization units without explicit causal relationships having been made clear somewhere in the process, the basic connecting threads and logic get lost. As a result, comments like the following are common from project managers: "We have a 40-page list of project tasks and no one has any idea of what we are trying to accomplish." This is a serious problem that is fixable when using top-down thinking and logical clustering.

Managing Multiple Bottom Lines

You can't win a game when you don't know how to keep score. Sports would be boring if there were no way of tracking who was winning.

How do *you* keep score? What's on your strategic scoreboard? What do you, your colleagues, your boss, and your boss's boss pay attention to? The ultimate test of any strategy is how well it delivers the measurable expectations we have in mind.

What gets measured gets managed. What you pay attention to and are able to manage, of course, varies by your job function, level, and responsibilities.

We all know what Measures command the most attention in most organizations: Financials and budgets. These are essential, no doubt, but if the strategies are not right, how much money is being left on the table? And what is being neglected that will eventually make the financials turn red?

The USDA food group chart reminds us to eat from a variety of food categories to stay healthy because excess reliance on just one category can make you sick. In a similar fashion, focusing attention on primarily the quarterly numbers can create organizational indigestion unless tempered with a long-term, big-picture focus. Many an executive has skimped on investing in research or training because it was perceived that these would not produce meaningful benefits in the upcoming quarters. Those myopic executives reasoned that by the time such investments bore fruit, they'd be out of there!

Contemporary management literature describes bottom lines, triple bottom lines, balanced score cards, and quadruple bottom lines. Let's up the ante by proposing a five-category model called "The Quintuple Bottom Line." The five Measures at the heart of this comprehensive model are:

1. *Financial Goals/Measures*—Rate of return, profits, sales growth, cash flow, savings, and compound Measures such as revenue per passenger mile (a key airline standard).
2. *Customer Goals/Measures*—Numbers, increases, type, quality, satisfaction, value-added, churn, and so on.
3. *Operational Effectiveness Goals/Measures*—Context specific, critical performance indicators (e.g., hotel occupancy, mean time between failure, and efficiency ratios).
4. *Employee Goals/Measures*—Number, skills growth, turnover, longevity, mix, satisfaction, and culture values-orientation.
5. *Community Goals/Measures*—Impact or involvement on local community (e.g. blood drives and United Way).

Not all Measures have equal importance at all levels. While the CEO keeps an eye peeled on all of these categories, your emphasis may be more selective.

Much of my consulting requests come from clients seeking practical ways to leverage their work unit's performance. These requests don't always come from the CEO. Plenty of motivated mid-level leaders

want strategic tune-ups. So, here is an approach we have found valuable to sharpen strategy and create executable action plans for any organizational level.

Quick and Clean Strategic Planning at Any Level

In a perfect world, the organization planning process would deliver—on a silver platter no less—your menu of Goals, strategies, projects already cleanly sliced and diced and ready for action.

But in practice, leaders must often create that clarity themselves by applying a version of portfolio management at their own organization unit level.

This chapter section features a case study of a client organization committed to improving their performance and productivity by doing just that. Their actual work products are included to illustrate how this method adds value. As you read, consider how their approach could bring clarity in your situation.

While the exact steps are tailored to each case, implementation generally involves a series of well-designed and facilitated action-planning workshops of one or more days spread over several weeks. The process draws on existing plans and documents and is fully compatible with—and provides ways to operationalize—the formal planning requirements of virtually any organization. And if your company's process is messy—well, this practical process is quick and clean.

The portfolio concept applies at all organization levels. After all, doesn't your own work unit manage a portfolio of projects that shifts over time? And doesn't your own work (as well as life itself) consist of an ever-changing portfolio of Goal-seeking projects?

Hands-On Planning Example in a National Lab

The Los Alamos National Laboratory (LANL) is an 8,000-person research institute in New Mexico spread out over a rugged mountainous area. LANL's vision is to be the premiere organization in the world applying science to the solution of technical problems critical to national and global security.

Their multiple missions include: (1) To provide the core material science and technology base needed to maintain confidence in the safety and reliability of the nation's nuclear weapons; (2) to apply

technical expertise to address a broad range of national security needs in energy, environment, infrastructure and conventional defense; and (3) to research materials to create new knowledge and lay the foundations for new technologies.

The LANL Geographic Information Service (GIS) team was comprised of 20 key players who provide various LANL customers with a variety of sophisticated maps, including topographic maps as well as specialized maps showing vegetation patterns, underground hydrology, wildlife, etc. These maps are not pulled off-the-shelf, but custom-created according to customer specifications.

The importance of GIS services became clear during the Cerro Grande wildfire that raced across the lab, burning 400 homes and threatening critical Lab facilities. GIS was quickly called into 24-hour operation and their maps helped emergency teams manage the fast-breaking situation. While the team delivered the necessary help through heroic efforts, the experience revealed serious shortcomings in how they operated.

They recognized the urgent need to improve because in the future, GIS information will be critical to protect the groundwater, potentially threatened by a legacy of buried nuclear wastes.

Eight Logical Planning Steps

The following steps offer a logical game plan for unit level strategic planning and execution. They derive from my experience assisting hundreds of teams in diverse organizations worldwide. The first seven steps get things going, the eighth keeps things rolling with periodic strategic updates. As we walk through each step, consider how you might follow a similar path with your own collection of projects.

Step 1. Clarify the Planning Context and Issues

Begin with a basic question—What are your primary motivations and desired Outcomes from the planning process? To strengthen teamwork? Shift directions? Attract new customers? Improve procedures? Get the boss off your back? Multiple Outcomes are possible. Define yours at the start.

Identify the boundaries of your effort by identifying the "system" for which you are doing the plan. Intact units are not the only choices—the system of interest could be a cross-functional group, a technology initiative, or various other configurations. (Sometimes it helps to define what is *not* included in your system of interest.)

The system of interest may thread through multiple organizations. On another project, I assisted the U.S. Advanced Simulation and Computing program (ASC) in developing a national strategic plan for supercomputer development. Their system of interest encompassed a broad network, which wove through parts of many different organizations and required integrating multiple planning documents with related technology blueprints.

GIS leaders Dr. John Huchton and his deputy Dr. Steve Koch had attended the Strategic Project Management seminar I conduct at the Los Alamos Management Institute, and immediately saw the applicability of the concepts. Dr. Huchton's primary Outcome was to make the unit operationally self-sufficient so that he could move elsewhere in the Lab. This meant putting in place action plans consistent with recently developed division and group plans, which were understood and supported by motivated, effective teams.

Step 2. Involve Key Players

Getting input from all key players is crucial. Because people support what they help create, you need to involve all key parties who have a stake in the process and its results. Begin by identifying and connecting with key internal and external stakeholders (customers in particular) to identify their concerns and needs. Many of these will translate into issues to tackle head-on, or at least to have on your radar.

Many different involvement roles are possible (e.g., giving input and opinions, joining planning team meetings, reviewing interim results, getting briefed on final results, and so on). Obtaining input can be as simple as meeting over a cup of coffee or it may involve structured focus groups and customer surveys.

Step 3. Scan Your Environment

Scanning your environment begins with examining all relevant business units' plans as well as those of your key outside organizations

and your customer base. In most cases, there is no single guiding master document. Vital pieces may be scattered across numerous documents. Review these in order to extract Objectives and highlight those efforts that relate to yours. Without doing so, it's like leaving a puzzle with a missing part and expecting it to be a complete design.

If appropriate, conduct an external environmental scan of some sort to identify trends, events, and drivers that influence your future directions. This is often done at an enterprise-level.

Broad-brush scans of the larger environment examine the big picture and change factors that may impact your plans. This wide-angle scan seeks to identify the SKEPTIC factors—Societal, K(C)ompetitive, Economic/Environmental, Political, Technological, Industrial and Consumer/Client (adapted from the Haines Centre ABC Model)—and any change blips on the radar which may impact your project during its life. This broad-brush scan is often done during a larger strategic planning process and is optional for individual projects.

GIS leaders examined the Division and Laboratory documents and highlighted Objectives to which their team might contribute. They reviewed documents and extracted a list of some 15 Objectives, which would be turned into strategies by the larger team during the hands-on action workshops.

Steps three through seven involve bringing together the core team (including key technical and administrative staff), in a workshop setting. Agendas for these sessions are custom-designed, and provide skills training followed by application to the identified issues. The GIS project agenda consisted of a concentrated two-day RAP (Rapid Action Planning) workshop for all staff with a one-day follow-up six weeks later.

For best results in this process, engage a skilled external consultant. An outside facilitator who is expert in action-planning workshop design and facilitation keeps the process moving. Choose a consultant who is a process expert, not a content expert. "Outside" may also mean someone who is an internal organization consultant with the right skills, but is not part of the immediate group.

Step 4. Revisit Your Vision/Mission/Values

Why should a team develop their own vision, mission, and value statements (VMV) when these already exist for the parent organization?

The reason is simple: Consciously choosing and shaping their own unit-level VMVs lets people better appreciate how what they do delivers real value to their customers and to each other.

For most employees, it's not easy to identify how their individual efforts contribute to critical high level missions such as, in this case, stewardship of the nuclear stock pile. There is a huge gap between such a broad mission and their day-to-day work. But writing homegrown, localized statements stimulates rich discussion, which usually leads to stronger engagement and personal commitment. Group-level Mission and Vision statements, of course, must derive from and support the larger organization statements.

Vision can be defined as *what we wish to see in the future that we can affect*; and Mission defined as *how we will get there*.

GIS Vision (What We Want to See)
Decision-makers use GIS-provided information in making informed decisions that support good environmental stewardship of the LANL reservation.

GIS Mission (How We Will Get There)
Efficiently provide various decision-makers with GIS-related maps and information that meet their needs.

Note that the connecting logic between Mission and Vision is a direct causal relationship and a linked operational hypothesis that says, "*If* we efficiently *provide* information, *then* GIS decision-makers can *use* the information."

Values are given lip-service and glossed over in many companies because they seem a given, or because values seem fluffy, or because even discussing them may feel awkward. Again, the benefit is to make these come alive with meaning for those involved. Values discussions deserve time—especially for new groups just getting their bearings are those aiming to shift operations norms.

Beginning from Lab-wide values, the GIS team crafted a set of agreed upon values that would become their operating norms in

delivering Vision/Mission as well as for making GIS a great place to work. Their list of one dozen included:

- Take responsibility
- Continuously improve
- Have fun
- Focus on the customer
- Respect each other
- Strive for excellence

A further refinement of values involves defining the specific behaviors that constitute the spirit of the value. What, for example, does "respect each other" mean on a day-to-day basis? Converting these into a set of observable behaviors (we "do-this" but "don't do this") builds a shared code of conduct that translates into improved interpersonal behavior and operational effectiveness. Exercises like this generate enormous energy and enthusiasm and build a high-performance, customer-oriented culture.

Step 5. Sharpen Your Goals and Measures

You can't manage what you can't measure. The measurement discussion is one of the most enlightening any group can have. Success Measures at the until level usually concentrate in one or more of the big five areas. They are chosen to reflect the key Goals that, when achieved, optimize the group's value-adding contributions to their customers' Goals.

GIS-selected key success Measures incorporated their mission, vision, and values; and thus, they turned these concepts into operational tools—not just verbal window dressing. Five clusters of Measures were chosen, along with specific indicators for each. (See box on next page.)

These Measures resemble the well-known balanced scorecard approach, which includes customer, employee and key internal operational Measures. Balanced scorecards, however, usually ignore VMV Measures and are seldom strategic in their derivation. But the major difference that makes this process so potent comes in the next step.

Step 6. Develop Core Strategies

This is the most creative part—coalescing the various Goals into a manageable set of strategies which collectively deliver the measurable

GIS Success Measures

1. Customer satisfaction with quality of GIS products and services (reflects GIS Vision and customers).
   - Increased percent of customers rate as "excellent"
   - Growing number of requests from current customers
   - Increased number of new customers
2. Efficiently provide our customers with needed services and products (reflects GIS Mission and customers).
   - Reasonable cost to deliver various products
   - Meet promised schedule a certain percent of the time
3. Greater team cohesiveness, effectiveness, and living our values (reflects employee values).
   - Reduced voluntary turnover
   - Increased staff morale
4. Effective and consistent utilization of best practices change (reflects key operational needs).
   - Increased percent of projects use standard conduct of operations
   - Ability to accurately predict time/cost to deliver a GIS map
5. Increased Division and Laboratory awareness of GIS Team services and products (reflect customers).
   - Increased number of senior-level managers and possible users who are aware

results. Developing strategies is as much art as science, requiring thoughtfully organized Objectives into meaningful and manageable clusters.

There seldom exists a one-to-one relationship between Goals and strategies, which is partially because of inconsistent language use and because an Outcome for the CEO may be a Goal for those lower in the hierarchy. The preliminary list of 15 GIS Objectives pulled from various documents was blended into a set of eight strategies. (When terminology

and perspective differences are reconciled, different Objectives statements from various documents often collapse into one Strategy.)

Chosen strategies should provide solutions to current problems and build future capacity.

In this case, GIS team member skill levels varied widely and employees used very different approaches to providing customers with maps. Some approaches were effective and time-efficient, while others were ad hoc and inefficient. There were few standard procedures, so they could not model best practice. As a result, *Conduct of Operations* became the top priority new strategy.

A related problem was that team members worked in geographically dispersed customer premises and seldom were physically together. Team cohesion and knowledge-sharing were low. So, *Team Networking* emerged as a vital strategy to strengthen team bonds. These two examples show how *analysis of problems leads to shaping specific solution strategies.*

GIS described their eight core strategies with a short title and brief elaboration.

1. *Conduct of Operations*—Improve formality of team operations and standardize procedures.
2. *Team Networking*—Improve team dynamics through periodic get-togethers and networking with colleagues.
3. *Continuous Process Improvement*—Continually improve team processes and services.
4. *Marketing*—Enhance team visibility and expand the customer base via web pages and information programs.
5. *Customer Feedback*—Monitor customer satisfaction through surveys and analysis of lessons learned.
6. *Customer Education*—Educate customers about the products and services we offer.
7. *Data of Known Accuracy and Lineage*—Ensure that maps have appropriate meta-data tags attached so customers are aware of limitations.
8. *Employee Development*—Enhance development of skills through formal and informal means.

Now comes the pay-off step: *Analyzing strategies in relationship to Success Measures.* This insightful step helps you zoom in on the right set

of strategies for maximum impact on Measures. The Strategies-Measures matrix offers a new lens to analyze what matters most—leading to thoughtful iteration, and refinement to uncover hidden synergy.

The generic form of this matrix is shown in Figure 4.2, while Figure 4.3 shows the matrix with the GIS Measures and strategies.

KEY SUCCESS MEASURES	CORE STRATEGIES						
	1.	2.	3.	4.	5.	6.	7.
1. Financial: • •							
2. Customers: • •							
3. Operational Effectiveness: • •							
4. Employee: • •							
5. Community: • •							

FIGURE 4.2 Generic Format of the Strategies-Measures Matrix

KEY SUCCESS MEASURES	CORE STRATEGIES							
	1. Conduct of Operation	2. Team Networking	3. Continuous Process Improvement	4. Marketing	5. Customer Feedback	6. Customer Education	7. Data of Known Accuracy & Lineage	8. Employee Development
1. Customer Satisfaction with quality of GIS products and services								
2. Efficiently provide our customers with needed services and products								
3. Greater team cohesiveness, and living our values								
4. Effective and consistent utilization of best practices								
5. Increased Division and Lab awareness of Team services and products								

FIGURE 4.3 GIS Strategies-Measures Matrix

✓✓ = Major Impact ✓ = Some Impact

KEY SUCCESS MEASURES	CORE STRATEGIES							
	1. Conduct of Operation	2. Team Networking	3. Continuous Process Improvement	4. Marketing	5. Customer Feedback	6. Customer Education	7. Data of Known Accuracy & Lineage	8. Employee Development
1. Customer Satisfaction with quality of GIS products and services	✓✓	✓	✓✓		✓	✓		
2. Efficiently provide our customers with needed services and products		✓		✓	✓	✓		
3. Greater team cohesiveness, and living our values	✓		✓				✓	✓
4. Effective and consistent utilization of best practices	✓✓		✓			✓	✓	
5. Increased Division and Lab awareness of Team services and products				✓✓		✓		

FIGURE 4.4 **Testing the Impact of Strategies on Measures**

In Figure 4.4, checkmarks in the matrix cells show the estimated degree of impact of each strategy on each Success Measure. The matrix provoked valuable discussion and helped them converge on the optimum set of strategies to deliver Measures throughout the project life cycle. The chosen cluster of GIS strategies would increase current effectiveness while also building future capacity.

After completing their work on a much-erased and rewritten whiteboard, the team reached a consensus conclusion and celebrated out loud: "We are covered!"

If you develop a Strategy-Measures matrix like this example, you'll establish a strong framework for achieving superior performance and delivering outstanding customer value.

Step 7. Turn Strategies Into Execution Plans

With a coherent set of strategies defined, the next step was creating action plans and building unified implementation teams, both of which can occur simultaneously when using the Logical Framework tool.

During the first GIS workshop, participants learned how to use the LogFrame and then formed sub-teams of two or three people to

begin developing plans for each strategy. The LogFrame helped members to wrap their minds around a complex issue and develop a solid plan. Between the first and second workshops, they met on their own to continue the work. Six weeks later, these preliminary project designs were brought back for consultant review during a one-day follow-up workshop.

A copy of Conduct of the Operations Logical Frameworks strategy can be found in the Appendix (You can view the GIS Team Networking design on the web site *www.ManagementPro.com*).

The LogFrame, of course, can be used on its own for discrete projects or strategies without going through the prior strategic planning steps.

Implementing new strategy involves change to create the future. But at the same time, today's operational work must get done. To avoid overwhelming the teams, GIS prioritized and staggered the start of each strategy rather than initiating them all at once. "Strategy owners" volunteered to manage each strategy. Two new "strategy starts" per quarter were scheduled, as shown in Figure 4.5, the implementation matrix.

The hands-on approach generated a strong sense of ownership, which translated into implementation momentum. A couple of months after the workshops, Dr. John Huchton felt comfortable that GIS was self-sufficient and took another Lab position as planned. The workshop products gave the new leadership team the

KEY SUCCESS MEASURES	CORE STRATEGIES							
	1. Conduct of Operation	2. Team Networking	3. Continuous Process Improvement	4. Marketing	5. Customer Feedback	6. Customer Education	7. Data of Known Accuracy & Lineage	8. Employee Development
Strategy Owner	**Ortega**	**Red Star**	**Bennett**	**Koch**	**Gebhardt**	**Oudejans**	**Woodward**	**McKown**
1st Quarter	✓	✓						
2nd Quarter			✓		✓			
3rd Quarter				✓				✓
4th Quarter						✓	✓	

FIGURE 4.5 **Prioritizing for Implementation: Project Starts**

foundation needed to smoothly take over and manage the program successfully.

Achieving organization excellence is an ongoing process, not a one-shot workshop event.

Step 8. Follow Up and Continue the Process

Build an annual implementation calendar that includes periodic review and refinement. Update your project plans as conditions change. By intelligently linking this with other processes and systems, you will establish your own practical strategic management system and harvest the fruit of exceptional performance.

Management consultants like me get warm and fuzzy feelings when a client letter comes out of the blue and reports a success story. GIS team member Tony Tagliaferro made these observations in an e-mail sent to me a year later.

> During these workshops, the folks in the GIS group came together and focused on a specific direction. We had become overwhelmed and disillusioned by the weight of the organization and allowed the bureaucracy to make us feel powerless and not able to get things done. But after the workshop, we felt empowered and in control. Our perception of upper management improved and things went smoother. We worked better as a team. Our morale and performance improved dramatically.

Tony's letter confirmed what a motivated group of men and women can do when given the right tools and empowered to shape their destiny. The LogFrame tools you'll learn to use in the chapters that follow will help you create and enjoy successful solutions for you, your team, and your customers. The process may get bumpy at times, but it's worth it to get the right ingredients in place to smooth out your system.

Key Points Review

1. The LogFrame can be the cornerstone of any unit-level management system. However, this presumes that there is a sound, overarching strategy to begin with. Since this is not always true, use the Quick and Clean planning steps.

Summary of Quick and Clean Strategic Planning Steps

1. *Clarify the Planning Context and Issues*—Be clear about your expected planning Outcomes and identify current issues to include.
2. *Involve Key Players*—Decide who to involve in your process to build buy-in and stay-in.
3. *Scan Your Environment*—Identify what's changing in your environment; and analyze division and department plans to extract Goals your group shares or owns.
4. *Revisit Your Vision/Mission/Values*—Turn these "fluff" statements into high-performance tools that energize staff and build shared commitment.
5. *Sharpen Your Goals and Measures*—Develop a meaningful performance scorecard that identifies how you deliver customer value.
6. *Develop Core Strategies*—Turn Goals into strategies, and test those strategies for impact against Measures to ensure smart choices.
7. *Turn Strategies into Executable Plans*—Using the Logical Framework. Let the responsible players flesh out implementation plans.
8. *Follow Up and Continue the Process*—Build momentum by reviewing and updating the plans while strengthening the planning process itself.

2. To add clarity to large or confusing portfolios, group projects by their Goal and Purpose. Projects with no clear Purposes are candidates for elimination.
3. Be clear about the Measures that matter in your organization unit. Pick meaningful Measures guided by the Quintuple Bottom Line categories.
4. Strong benefits come from developing a strategy and Measures matrix.

This Part One overview, should give you an initial understanding of how Strategic Project Management concepts add value. The four chapters in Part Two drill down to explore the Four Critical Strategic Questions in detail, and illustrate how to apply them at the project level.