

Notes from Duke's Casebook

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The Getting Results Issue

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About this edition

Linking to Cyberspace and Beyond

With this edition I begin the transition from paper and print to electron. I started as a journalist and I love to hold what I read. I'll always make my writing available to those of you who like to print and read it.

But all of this material can also be accessed on my blog. And my next newsletter will come after I've accumulated enough blog material to put it in this format for you.

You'll find the articles in this newsletter and a lot more on my blog: www.dukeonline.blogspot.com

Duke Kuehn
May 23, 2009

The Facilitator's Toolbox: How to Solve Problems as a Group

There is a quick and efficient technique I use to help groups work through problems. I must have learned it somewhere, but I don't know where. I call it the accordion technique because it starts "closed," opens up fully and then comes to a complete close.

Here's a step-by-step guide to how to do it. First, clearly define the problem. Be clear about what you are trying to solve. Make sure that everyone

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Getting the Most Out of Strategic Planning

I think it's time to take the discussion about strategic planning to a new level, what Tim Galwey years ago referred to as the "inner game." By now most people have a pretty good idea of what strategic planning is, how to do it and the primary benefits to be derived from its application.

Just in case you've missed it, strategic planning is simply a process for setting long term goals - as much a way of thinking as a technique. I've found strategic planning to be a powerful device for improving organizational performance.

But, done correctly, the process can have a transformative impact on an organization and its leadership. Above and beyond the goals it generates, the process leads to the unexpected dividends of more consistent and continuous leadership, greater accountability and effective management and increased engagement and commitment of employees.

These are big claims and when I started, 300 plans ago, I couldn't have made these assertions with confidence. I have, however, seen it happen again and again... the very act of planning, quite independent of the plan's goals and objectives, has a beneficial impact on all aspects of the organization's operations.

I first discovered this when I worked with school board members. Governing a public school district is a tough job and directors have to work through really difficult policy decisions in the most basic of legislative formats. I noticed a change in the directors whose districts embarked upon a planning process, both individually and a legislative body. As they worked through the strategic planning process they actually got smarter.

The planning process's emphasis on getting answers to questions did two things: it replaced opinion and myth with fact and it created an appreciation for data. And they did, in fact, get smarter. They learned a lot about

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PROFILES IN LEADERSHIP: REALTORS®

I don't see why I can't choose a group to salute for their leadership. In my years of work at the local, state and national levels I've found REALTORS® - their leaders, at least - possess some admirable traits worthy of some praise. They are obsessive about their code of ethics and exhibit at every level, commercial and residential practitioners alike, a marked dedication to self improvement and professionalism.

I recognize I have been exposed to a sample of elite REALTORS®, those who become involved in leadership roles through their associations. But if they are the visible spokespeople for their industry, they do a great job projecting and exemplifying honesty, hard-work and ingenuity

Two things really strike me about REALTORS®. The first is their willingness to take on community leadership roles. They recognize their centrality in the culture and commerce of their communities and it's a sure bet that a REALTOR® active in her or his local board will be found as a volunteer on a half-dozen other local boards, associations and committees. Of course, such activity and visibility is good for business, but I've known enough REALTORS® to recognize how much they care about their neighbors. They are leaders of the highest order.

The other trait is optimism. Maybe too many dead weekends in the office or sparsely attended open-houses generate a way of finding the silver lining, but even in the worst of times, like, well, now maybe, they exhibit a healthy attitude about the future. Maybe that's why they are so good at strategic planning and readily take to my approach. They truly believe that through their efforts they can make the world a better place.

The Strategic Gourmand: A Tasty Summer Drink - Pimm's

When you live in the Pacific Northwest you come to appreciate the summer and its sunny days and long evenings. The maddening damp from late October to mid-April is made tolerable by nearly 18 hours of daylight in summer.

The Brits understand this. That's why the coming of summer is met with a wonderful drink, the Pimm's Cup. Altogether unknown in the US (as it the liqueur that fuels it) this is a beverage that will make any summer day just a little sunnier.

Pimm's is the trademark for a spirit (specifically Pimm's No. 1 Cup, even though it's in a bottle) that as best I can figure it out is a spiced brandied gin. By itself it's a nice *aperitif*. In the cup, mixed with ginger ale it is a snappy base for the cocktail.

It's a staple in London pubs and throughout southern England in the summer; think of it as England's marguerita. It's easy to mix, easy to drink and it will put you on your behind if you don't watch out... Pimms is 25% alcohol by volume. 50 proof!

Take a tall glass, fill with ice-cubes. Pour about a 1/3 of a glass Pimms and fill the rest with lemonade or ginger ale. The garnish is important here... lemon and a long stalk of celery are preferred. The adventurous might go for a carrot or asparagus I guess, but the celery adds a clean taste to clear your palate for the next cup o' Pimms.

Pimms, by the way, makes an interesting mix with gin. One way or another, drink enough Pimms and you'll need you sunglasses.

I Wish I'd Said This:

In Carol De Giere's biography, of composer and lyricist, Stephen Schwartz (Godspell, Wicked) on getting started: *I tend to follow the "path of least resistance," rather than trying to write sequentially. When starting the score for a show, I tend to start with the song that seems easiest to me, the one that comes most naturally. Often, it's trying to get at the emotional or philosophical center of the story... but not always. It's most important just to open the door and step into the show somewhere. (Defying Gravity, p. 299)*

Why?

Schwartz captures an important principle here, planning is hard enough without having to make it harder by taking on the toughest pieces first. What he expresses is a keen sense of priority. Something's have to be done right away. They are so critical to the organization's sustained fulfillment of its mission there is no choice. Most of us can figure that one out as priority number one. What next? Finding the "dunk shots," or "low hanging fruit," is smart strategic planning. Just getting started is reassuring; getting quick results is motivating (and the perfect antidote to skepticism and cynicism). I look at the easy ones as portals, their early achievement opens the door to getting started on other objectives.

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agrees and understands what the issue is.

Second, identify the conditions that would not make it a problem. Yes, it's counter-intuitive, but identify what it is you want as an outcome. Use the desired outcomes to identify criteria for a satisfactory outcome.

Third, consider multiple options. Not just one, at least three: do nothing (that's always an option), resolution (mediation) and total solution (cure). This is the fully open accordion.

Fourth, compare the options with the criteria, determine the option that best fits. At this stage it is often useful to modify options to fit criteria or to prioritize or add weights to criteria.

Fifth, close the accordion, select the desired modified option, identify strategies for implementation.

The key to making this technique work is in the beginning, making sure there is a clear understanding of what needs to be solved and in the middle, when an array of options needs to be considered. Watch out, groups lose energy the minute any option is identified. Don't let them stop there; consider multiple options for the best decisions.

Duke's Rule #13: It's Easier to Get Buy-In Before than to Sell it Afterwards.

This is one of the most commonly violated management rules in the book. In the isolation of their office, managers dream up all sorts of ideas which get shared in a memo found in everyone's mail slot the next morning. Grumbling follows, mistakes get made in implementation and after considerable misgivings, discomfort and passive aggressive comments the manager starts the process of getting influential employees to support the new idea.

All this could be avoided by following the codicil of this rule: if you are going to ask people to do something, find out beforehand what they think of the idea. Many times you'll learn of an obstacle that needs to be addressed. Even if you encounter resistance you'll be a step ahead in trying to dissolve it. And by sharing your ideas with others beforehand you'll get their enthusiastic support later on.

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their districts through the scanning process... realizing that the their many constituencies and stakeholders often had quite different opinions on a given issue and that it was the board's responsibility to ask the questions and to listen to the answers.

The plan itself, of course, contributed to a broader perspective, a strategic way of thinking about district issues. Board members who had been part of the planning process started to pay close attention to the district's mission, vision and values creating a strategic context for discussion of problems. You could hear this new, broader perspective in the language they used.

I was surprised when I first saw this. I have, over the years, done lot of leadership development training and education. In all the hours of class and training room work I'd never seen people make such significant changes, not just in thought, but in action. I watched these directors become better leaders.

The impact the planning process has on the continuity and consistency of leadership is of particular relevance to associations, most of which employ a unique governance structure where leadership is based on a partnership between an annually elected President who, as a member, volunteers to serve and a hired professional association executive.

In most cases what presidents want to achieve in their year of leadership is consistent with what the association is trying to accomplish in the long run. But there are occasions when well-intentioned presidential goals distract from the strategic plan or, occasionally, actually subvert the association's long term goals.

A well done strategic planning process can do much to generate consistency and continuity by channeling presidential interest. Annual Presidential initiatives flow into and reinforce the association's three year plan. Even better, leadership teams have an ability to support and advance each other's annual agenda long after a President is out of office.

The key here is to honor both the passion of the association President with the focus of the association plan. It can be done with results that reinforce and supplement the strategic plan.

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Along with the benefits of better leadership, strategic planning's need for a clear mission and performance measures has a direct, positive, impact on the management of an organization. The focus provided by a strategic plan comes from the clarity found in the organization's mission... not some flowery string of platitudes, but a simple declarative sentence of what the organization must do and must get for those efforts. It's no accident that most strategic planner facilitators begin by writing a mission statement, because everything in an organization begins and ends there.

I spent some time analyzing mission statements and came to the conclusion that the best ones were nothing more than do-get declarations. I have often cited, although I've never found it written anywhere, a mission attributed to Alfred P. Sloan when he became President of General Motors in 1923. Supposedly surveying the diversified GM empire he said, "We bend metal for profit."

Pretty straightforward stuff: noun, verb, object. The beauty of such clear thinking is that it leads to clear action so that anyone at GM, CEO to the person sweeping out the factory after the shift gets it; his or her job is to make that mission happen. A well done mission statement doesn't have to be as linear as Sloan's, but conceived of in this manner, the mission statement lays the foundation for the powerful management device of performance measurement.

As a simple proclamation of what an organization does and what it is expected from those efforts, the mission provides what, using the technical language of performance measurement, is needed to determine whether efforts produce results. It defines both outputs and outcomes,

For many organizations this is a huge step forward and a signal effort towards holding an organization accountable... not for just what it does, but for what it achieves. Such thinking leads quickly to the idea of an organizational report card or, as Kaplan and Norton put it, a balanced scorecard measuring organizational performance in terms of financial outcomes, customer satisfaction, organizational capacity (internal business practices) and the adequacy of its knowledge base (this latter equating with organizational intelligence).

Once measures are identified it is possible to track organizational performance over time. The first year of measurement establishes a baseline against which every succeeding year can be compared. Similarly, performance can be benchmarked against other organizations. These are effective ways of determining whether goals are being achieved and to identify "gaps" to be filled.

The fundamental impact of using performance measurement as a management tool is to shift the thinking from opinion and myth to data and fact. While care needs to be taken to assure the validity of these measurements and their application, their use to inform management decisions can be transformative.

Along with the unexpected consequences of improved leadership and management, simply doing strategic planning tends to boost employee commitment (and in associations, member involvement). This beneficial outcome occurs because of two things: the manner in which employees and members are engaged in the planning process and from the focus the plan brings to everyday operations.

A correctly facilitated strategic planning process should use a team that engages the whole of an organization, not just executive and board leadership. Because a perspective from on the ground is needed, involving the folks who will do much of the plan's implementation assures it actually will get done and with enthusiastic buy-in. As referenced elsewhere in this newsletter, it's easier to get buy-in before the fact than to sell an idea after the fact. I've seen disasters averted and shortcuts discovered because an employee or member well down in the hierarchy could see what was going to happen and, as a member of the planning team, able to offer a warning.

Planning provides a focus that make most people's work easier... often linking apparently disparate acts into a whole unified by the organization's mission. It's not just a case of getting everyone on the same page, it means creating an environment where people feel part of something. A clear mission and compelling vision creates the foundation for a true community.

Planning is not the answer to everything, but it can be an effective tool for achieving unprecedented, transformative organizational results.