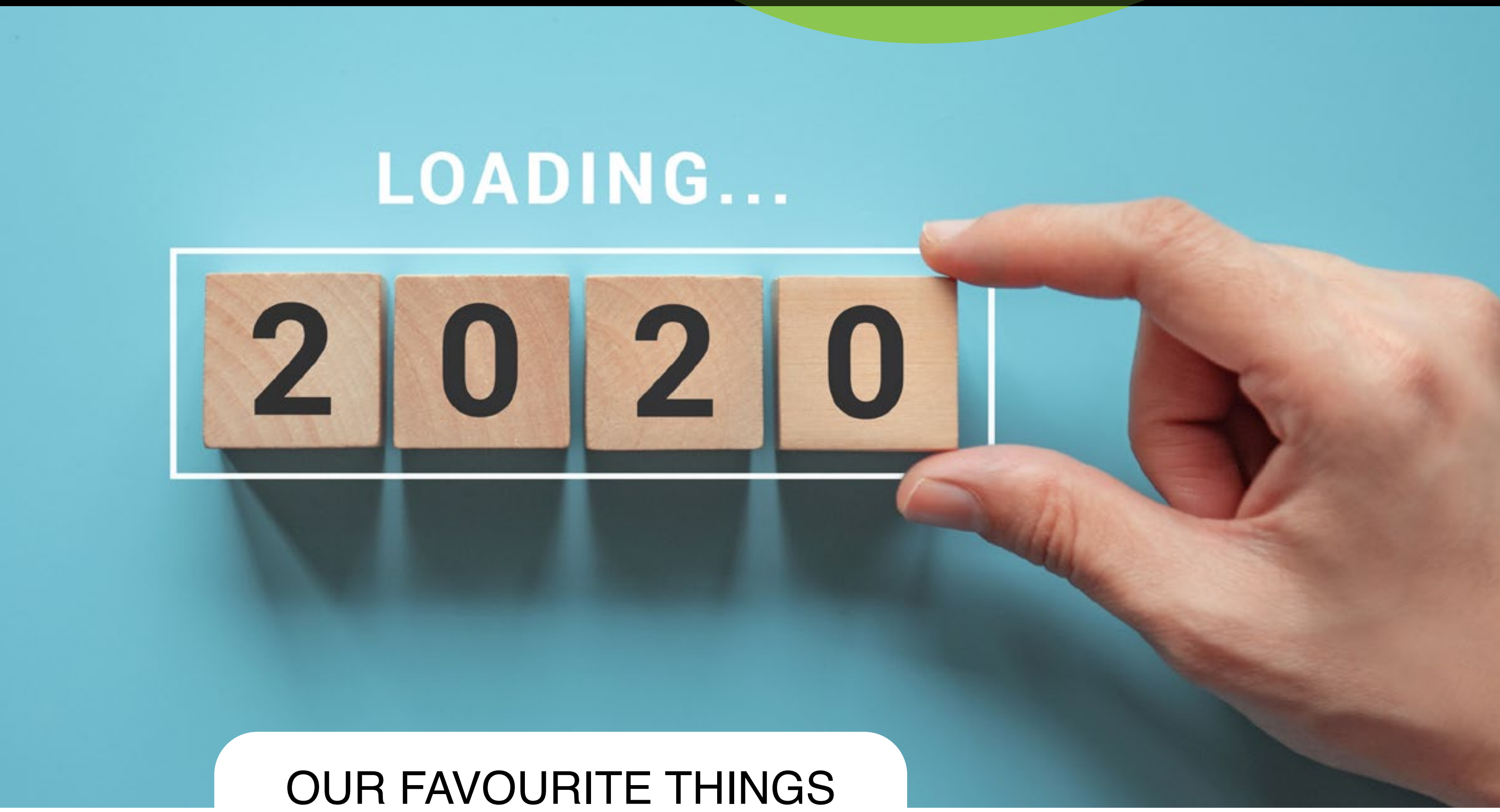
Think. Plan. Do.



OUR FAVOURITE THINGS

NEW YEAR NEW CHALLENGES

Ideas to inspire action

1	**ALLOCATING RESOURCES MORE FLEXIBLY:** Three practices of agile resource allocators
2	**ORGANISATIONS THAT DELIVER:** Five elements that set the best apart from the rest
3	**ORGANISATION EFFECTIVENESS:** Improve vertical and horizontal team alignment
4	**STRATEGY EXECUTION:** Has your organisation got the Ex-FACTOR?
5	**AFTER THE EVENT:** How to get full value from your strategy workshop outcomes

Think. Plan. Do.

At Right Lane, most of our work centres on helping our clients develop and implement better strategies. Because it's so central to our practice, we try to stay on top of every development in the academic literature and practitioner discourse. We reflect regularly on our project learnings, and we endeavour to harness our own ideas and advance knowledge in the field.

As we march towards the fourth quarter, the focus inevitably turns to delivery and alignment: What to do with those strategy workshop outcomes, how to align strategy and resource allocation, how to execute.

This collection ***'New year, new challenges. Ideas to inspire action'*** includes some of our best thinking with regard to resource allocation, team effectiveness, strategy implementation, and getting full value from strategy workshop outcomes.

As you read this collection, we encourage you to get in touch with the Right Lane team to discuss any of the themes covered in it. If these topics are on the minds of our clients, we feel sure you will be thinking about them too.

We'd love to talk to you about it.

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by dr marc levy

Three practices of agile resource allocators

Right thinking

In response to a persistent challenge experienced by many of our clients – how to allocate resources more flexibly – we propose three practices of agile resource allocators. By re-anchoring the budget each year, reprioritising frequently and managing capacity with agility, organisations can allocate resources where they are needed, when they are needed there.

The widespread use of the term 'agility' in business, appears to have come about in the mid-to-late 1990s as a reaction to complexity; in the last decade it has become pervasive as an organising discipline in software development. More recently, it has spread to other domains, notably (from our vantage point) to strategy and resource allocation.

Right Lane started writing about agile strategy, ways of working and resource allocation nearly six years ago (Levy & Hardy, 2014), based on projects we had completed in the years prior to that. Despite some advances since (Levy, 2018), one question that resonated with our clients then remains pertinent today:

How can we allocate resources more flexibly – with less friction – to where they are really needed, when they are needed there?

It's obvious *why* we should answer this question, as to do so will increase speed and responsiveness and reduce waste. But for many of our clients a compelling, and enduring answer to this question has been elusive. Below we propose three practices of agile resource allocators for organisations looking for solutions.

1. Re-anchor the budget each year

Lovallo and Sibony (2014) described a budgeting scenario well-known to most CFOs: '… it was a long, exhausting process that was not particularly effective. As the presenters showed you their plans, you probably challenged every number and explored every assumption … but if you're honest, you have to admit that each unit's final budget for next year looked a lot like the one its managers proposed at the beginning of the budget process—which in turn wasn't much different from … the previous year.'

There are obvious and compelling arguments in favour of de-anchoring from last year's budget when setting this year's: there is a need to take an enterprise view to today's challenges; the accelerating pace of change requires a more nimble reallocation of people and money; the literature on zero-based budgeting is nearly 50 years old!

Despite these points, intractable mindsets get in the way. In some organisations, executives are preoccupied by a 'use it or lose it' mentality; in others, the budgeting process remains driven from the bottom, with executives feeling the need to defend their patches.

Organisations beset by these difficulties must move towards building the budget from the ground up every year and in the process provide greater comfort to their boards that their budgets are robust to contemporary realities.

Potential pay-off: A budget that gives your board the confidence that management's ask embodies give and take. In addition to spending more in some areas that require it, you will spend less in others that don't, as emphases change to reflect the issues and challenges facing the organisation now.

2. Re-prioritise frequently

Initiative prioritisation can be tricky, particularly for organisations in rapidly evolving industries with large project portfolios. We've found that our clients have become much more systematic and practiced at it, by, for example, striking a more sustainable balance between the urgent and important, better squaring effort and impact, and being alive to the power of sequencing.

Where organisations often fall down, however, is in the frequency and robustness with which they review and re-prioritise initiatives and projects, and the extent to which they take a total portfolio perspective when they do so.

We've found that using a 'suped-up' version of an old facilitation framework, 'start, stop, continue, change', quarterly, in concert with financial reforecasting, gets funds moving within and between departments, to where they are most needed.

To increase confidence in re-prioritisation, we are strong proponents of one, shared, source of truth: an integrated benefits realisation framework, with all initiatives and projects contributing in one or more ways to the same set of consistently defined value drivers (Levy & Chhikara, 2018).

Including out-of-cycle investment requests gives added significance to agile re-prioritisation. Managers should pitch for resources from the available funding pool – including funds made available from initiatives and projects that have been dialled down or turned off – to support project needs that arise outside the planning and budgeting cycle.

Organisations can further 'supe-up' re-prioritisation by training participants on decision biases that inevitably restrict re-prioritisation.

Potential pay-off: A portfolio of initiatives and projects, and associated resource allocation, that makes sense today and reflects the fact that management did not, and cannot, have 20:20 foresight when setting the budget.

3. Manage capacity with agility

We've observed before that projects are winning the battle for resource allocation: organisations are increasingly 'standing up teams' to get important things done rather than relying on staff in fixed roles to deliver projects in their spare time (Levy, 2018).

More organisations will look like professional services firms, with a higher proportion of their people being flexibly deployed and redeployed.

Many of our clients are continuing to add resources to their PMOs to meet project needs as they arise. Senior executives and executive teams are taking ownership of these increasingly prominent bodies of work and spending more time on them. Organisational leaders are 'bellying up' to the idea that some of their best people might be more effectively employed as flexible problem solvers rather than in conventional job roles.

With more people on projects, agile resource allocators have moved from waterfall to agile project management in order to improve performance. In doing so they have reframed project planning – moving from fixed scope, with variable timelines and resources, to variable scope (scope 'grooming', iterations based on feedback loops, etc.) with fixed resources and timelines (Aljaber, 2019) – aiming to increase productivity and cycle time and reduce cost.

Potential pay-off: Managing capacity with agility leads to a more engaged and productive workforce, that gets things done faster, with clearer line of sight to the strategy.

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That we should substantially do what we did last year, or marry our initiatives, or hire people for indefinite permanent roles that may not be of enduring importance, should be harshly scrutinised in light of the accelerating pace of change.

We advise clients to re-anchor the budget each year and to re-prioritise frequently. Not everything that made sense in April or May of the previous year, when the budget was fixed, makes sense now. Further along, management probably needs to change the scope of some initiatives and projects and stop or start others. And, we advocate managing capacity with agility: with unrelenting, and increasing, pressure on budgets, organisations need to constantly optimise the impact of their most important asset, their people.

> We advise clients to re-anchor the budget each year and to re-prioritise frequently.

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The author would like to thank Matt Hardy for his comments on a draft of this article.

by abhishek chhikara & debbie williams

Organisations that deliver

five elements that set the best apart from the rest

Right thinking

Does your organisation have what it takes to successfully execute its strategy? Five elements set the best apart from the rest. Winning organisations:

1. Cascade their strategies successfully
2. Effectively prioritise and sequence activities
3. Create alignment within and across teams
4. Adopt an effective approach to decision-making
5. Commit to accountability for outcomes.

Strategy without execution is just a collection of ideas – executing on it requires committed effort across the organisation. Leaders cannot stand back and watch after articulating the strategy; instead they need to roll up their sleeves and actively engage the organisation, addressing all five elements of effective strategy execution.

In previous Right Lane Review articles, we have shared our approach to setting a clear strategic direction (Levy 2016, Williams, Chhikara & Levy 2017). But once you have a clear strategic direction, what next?

While it has become a management truism that strategy execution is at least as important as strategy development, we have observed that it often remains an afterthought within organisations, with predictable results.

It should pay then to look to leading organisations. We believe that the organisations that are best at strategy execution share five common elements – abilities to successfully cascade their strategies; effectively prioritise and sequence activities; create alignment within and across teams; adopt an effective approach to decision-making; and commit to accountability for outcomes.

1. Cascade the strategy

The strategy is well understood, and activity is aligned to it throughout the organisation. There is a simple strategy and planning 'architecture', not piles of unlinked strategies nor layer upon layer of plans.

Employees are able to describe how the strategy affects their priorities and guides their choices. Individuals' responsibilities and activities are clearly linked to the strategy, so everyone knows how they contribute to delivery. Language used in the strategy becomes part of the everyday and feels natural. There are visual reminders of the strategy in shared spaces (see Spiteri 2013).

2. Effective prioritisation and sequencing of activities

Managers have an ability to seize compelling opportunities that support the strategy while giving due attention to the organisation's capacity to execute. Managers within the organisation understand that strategy is not only about where to compete and how to win, but also about when to make moves and in what sequence.

It's striking to us that many large organisations try to do everything at once and overcommit to initiatives, while start-ups and early stage organisations are more inclined to artfully choreograph their steps and stop initiatives more quickly when they falter or fail to deliver.

Helping a team to understand what good looks like, where they are today and what the opportunities are to improve, is a good place to start. Outcomes of this work may include a set of prioritisation and sequencing principles; for example, the team may decide to: align to a set of prioritisation criteria based on urgency and importance; commit to prosecute two major initiatives and four 'minors' at any one time; agree to quarterly reprioritisation; or schedule initiatives over three time horizons.

3. Create alignment within and across teams

In organisations that are good at strategy execution, people understand their roles and responsibilities, and how their work supports others' work – and information flows freely across organisational boundaries.

Sporting metaphors can be an apt way to identify opportunities for improvement **within teams** – to help colleagues understand the complementarity of their roles; to know when it is their turn to deliver; and to align to a simple game plan that gets results.

We suggest that teams conduct a role alignment exercise (Bregman 2013), involving everyone sharing their top five activities for the coming period and then working together to examine horizontal and vertical alignment between roles, and to clarify interdependencies.

We sometimes conclude strategy workshops by asking participants to share the distinctive role they can play in the delivery of the strategy. Having colleagues engage with each other's 'distinctive roles' can help to foster alignment.

Alignment **between teams** can be increased by understanding each team's perspectives and intentions; identifying joint 'wins' between teams; working to improve common processes; agreeing shared values and behaviours; and committing to 'cadence of accountability' (Kaplan & Norton 1996; McChesney, Covey & Huling 2012).

4. Adopt an effective approach to decision-making

Within the organisation, decisions are well informed, made in a timely manner and, once made, decisions are rarely second-guessed.

Effective decision-making can be the key to unlocking an organisation's effectiveness. It starts by having a clear understanding of the problem you are trying to solve, and a set of guiding principles that inform decision-making. Every decision is different, from the impact it may have to the urgency and importance. Great decision makers categorise decisions and agree their approach to different categories – for example, how you make 'big bet' decisions versus what you delegate? The process is underpinned by a commitment to embedding effective decision-making and empowering employees (Deng 2018).

5. Commit to accountability for activities and outcomes

People within the organisation have a clear sense of the deliverables and outcomes they are accountable for and are able to rely on their colleagues to deliver on their commitments. Often in our work, we see organisations being explicit about the activities their employees are required to perform, but without properly anticipating the attendant results.

Both are important. Employees that are accountable for actions and not outcomes can waste time on work that isn't making a difference; accountability for outcomes and not actions can undermine the proper functioning of management and efforts to understand value creation within organisations.

Performance should be reviewed formally and informally, with individuals and teams openly discussing the drivers of performance. There should also be processes in place to address persistent under-performance so that the culture of accountability is not undermined.

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In our experience, organisations that struggle to deliver on their strategic aspirations face challenges with at least one or two of the elements mentioned above. We have found that running a strategy execution effectiveness diagnostic can help managers to identify where their organisation's issues and challenges may lie, in order that improvement efforts can be targeted.

Strategy without execution is just a collection of ideas. An organisation that delivers is at once constantly making harmonious choices at all levels and is able take a collection of good ideas and turn them into concrete results. So, at the start of the next strategy and planning cycle, consider whether your organisation has what it takes to deliver.

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by zoe pappas & jess cossens

Enhancing effectiveness

through improved vertical and horizontal team alignment

Right thinking

An organisation's effectiveness is fundamentally dependent upon the alignment within and between the teams on the frontline. As Patrick Lencioni puts it, 'if you could get all the people in an organisation rowing in the same direction, you could dominate any industry, in any market, against any competition, at any time' (Lencioni 2002).

There are five practical steps you can take to improve vertical and horizontal team alignment:

1. Develop clear departmental strategies that support the enterprise
2. Align accountabilities and priorities of leaders and teams
3. Establish principles for collaboration
4. Manage 'boundary stakeholders'
5. Make the 'real work' fun.

In 1085, the British Navy, commanded by Admiral Horatio Nelson won a consummate victory against a numerically superior Franco-Spanish force at the Battle of Trafalgar. Historians widely attribute this victory to two factors. Firstly, Nelson's tactic of 'breaking the line' represented a disruptive strategy innovation, to which his opponents were unprepared to respond. Secondly, the British Navy, having spent the proceeding two years at sea blockading the French and Spanish fleets in their ports, had reached a pinnacle of operational effectiveness. Nelson had a brilliant strategy, but without the high degree of alignment within Nelson's fleet, this strategy could not have been executed so effectively.

A strategy is only as good as the team charged with delivering it. It will come as no surprise to any executive or manager that one of the keys to effective strategy execution is to have your teams focussed upon common goals and aligned in their

approach to delivering these. However, building alignment both vertically, from executives to leaders and their team members, and horizontally, across different teams and sub teams, requires considered and sustained effort. We have identified five actions which will help make sure your team is working together effectively towards delivering your organisation's strategy.

1. Develop a department strategy that supports the enterprise

Generally, higher-level employees will feel they have a solid understanding of the organisation's strategy and key objectives, and will recognise where and how they can contribute to these. This is a great start. However, this awareness often dilutes further down in the organisation (Galunic & Hermreck 2012). To combat this, Heads of Department should develop their own departmental strategies to bring the enterprise strategy to life for their team.

This process is two-fold. Firstly, there must be a clear communication of the enterprise strategy and an explanation of how this department is expected to contribute to it. Where possible, this communication should be from a representative of the executive, ideally the CEO, who will be able to explain the strategy with the level of passion and clarity required to motivate the team (Galunic & Hermreck 2012).

The second step is a lot more challenging, developing a department-level strategy that will enable delivery of the enterprise strategy. For example, we frequently work with support services departments to help them understand where they can add greatest value at the enterprise level, and then translate this into fundamental goals they must achieve over the next year. The departmental strategy must clearly articulate not only what goals the department is seeking to achieve, but also how it will measure its success and how achievement of these goals will support the enterprise strategy (Gallo 2010). Providing this level of clarity at the department level empowers individuals to directly see the contribution of their work as it flows up into the wider organisation.

2. Align leadership accountabilities and individual priorities

Once a departmental strategy has been defined, it is important to align priorities and accountabilities at an individual level. We often recommend the following simple framework to assist with this (Bregman 2013). The process begins with the Head of Department who will share their top five priorities for the next twelve months. These priorities should align closely with the fundamental goals laid out in the departmental strategy.

The Head of Department's direct reports then share their top five priorities for the same period. The group can then check for alignment across this level of the team. Is the Head of Department receiving enough support for all her priorities? Is there unnecessary overlap between general managers in certain areas? This exercise can be repeated with each subsequent layer of the department until all staff are represented and a full priority map is formed. In addition to aligning priorities across the department, this exercise also highlights opportunities for intra-departmental collaboration.

3. Establish principles for collaborative ways of working

Depending on the maturity of your team, establishing clear expectations for how the team will work together can be a crucial step. Are you engaging a new team figuring out their forming stage, a team

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struggling through storming, or a norming team striving to perform (Tuckman 1965)? High performing teams demonstrate high levels of trust, are comfortable with constructive conflict, show strong levels of commitment, hold each other to account and are results oriented (Lencioni 2002).

While for mature teams these expectations might be well understood, newer teams, or even established teams who are failing to thrive, can benefit significantly from making these expectations explicit. Having a candid conversation and agreeing principles for how your department will work together provides a framework to guide individuals through any intra-departmental challenges that may arise.

4. Manage 'boundary stakeholders'

In the workplaces of today, few teams work in isolation. In fact, helping move teams away from siloed operations is a request we hear from clients almost weekly. To promote effective collaboration beyond the departmental borders we recommend developing strategies to manage your 'boundary stakeholders'.

Boundary stakeholders refer to those with whom your team interacts on a regular basis to perform their day-to-day work and collaborates with to deliver cross-functional projects. They can include other departments within your organisation, as well as external service providers or other partners. To truly enable your team to perform at its best it is important to identify who your critical boundary stakeholders are and to manage their needs accordingly. In some cases, this may be as simple as developing a communications plan to ensure other departments understand your team's refreshed priorities.

In other circumstances, a more defined partnership alignment strategy may be required to formalise how these teams will work together. Some of our clients have used Robert Kaplan and David Norton's strategy maps to manage internal and external alliances (Kaplan & Norton 1998).

This involves identifying 'wins' for each party, and common 'wins', along with desired customer outcomes stemming from the alliance, joint business processes, ways of working and values of the alliance.

5. Do some real work ... but make it fun

One final piece of the puzzle, not to be overlooked, is the importance of making team alignment sessions that are part of this effort fun and engaging. We have found enormous value in incorporating some light-hearted team bonding throughout the sessions, offering participants a chance to connect with their teammates on a personal level, share a few jokes and enjoy each other's company. These activities should not be entirely frivolous. You can get small cross-functional groups working on an organisation's real challenge, but add a creative twist. For example, during a workshop for a client that was considering moving to new premises, we asked the participants to work together to build physical models of their future office. Not only do these interactive sessions build greater team cohesion, but the fun can act as a trigger for improved memory retention (Gilkey & Kilts 2007).

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After a team alignment process, it is important to establish mechanisms to maintain the change; for example, by bringing the team together regularly to address any friction points. And, of course, it is important to recognise the team's achievements and celebrate its successes along the way. Quarterly team catch ups incorporating progress reviews and social time are an effective way to do this.

Promoting alignment requires both discipline and habit. In the nineteenth century the Royal Navy accomplished this through a combination of corporal punishment and institutionalised alcoholism. Thankfully modern leaders need not resort to such extreme measures to foster alignment within their organisations! Instead, leaders can greatly improve the horizontal and vertical alignment within and between teams by stepping through the activities outlined in this article. Whether you're working with a newly formed team, or one that has been delivering for many years, most teams can benefit from taking the time to reflect upon and enhance their alignment, to ensure they are working effectively towards the goals that matter most.

> 'We have found enormous value in incorporating some light-hearted team bonding throughout the sessions, offering participants a chance to catch up with their teammates on a personal level, share a few jokes and enjoy each other's company.'

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by dr marc levy &
dr james mills

The great 'business bake-off'

Has your organisation got the Ex-FACTOR?

Right thinking

In our experience helping hundreds of organisations with strategic development and execution, we have found that those that adhere to six critical steps (Frame, Align, Cascade, Task, Oversee and Review) can avoid the common strategy execution pitfalls. To truly excel at strategy execution however, organisations must go beyond this basic recipe and discover their own 'Ex-FACTOR'.

It takes more than just a great strategy session to revitalise a stalling business, dramatically improve customer experience or develop innovative products that leave the competition behind. In truth, crafting a brilliant strategy is just the first step towards winning in the market. The next challenge is delivering on the strategy.

The great 'business bake-off'

An analogy we use likens competing in the market to entering a baking competition. The first vital step is to decide what it is you are going to bake. Since the competition is fierce, many entrants enlist expert help to analyse the judges' preferences, find out what the other contenders are baking, and design a recipe that is worthy of first place.

However, crafting a world class recipe is a far cry from winning the contest. As most who have some experience baking will attest, few cakes come out of the oven looking like the picture in the recipe book. The same is true in business.

The gap between strategy and execution

The academic and popular business literature is replete with perspectives on the challenges associated with strategy execution: 'Strategy is easy; execution is hard' (Mizrahi, 2016), 'Why strategy execution unravels and what to do about it?' (Sull et al, 2015), 'Is execution where good strategies go to die?' (Bonchek, 2017). Reputedly, as many as 67% of well-formulated strategies fail due to poor execution (Carucci, 2017).

But why is execution so difficult? Is it because some executives don't know what to do? That's probably part of it, although if you put any group of executives in a room for an hour and brainstormed strategy execution success factors, the chances are they would come up with a pretty good list. This is not to diminish it per se, but rather to recognise that there must be other factors at play.

The Ex-FACTOR

To better understand why some organisations succeed where others fail, we've reflected on the hundreds of organisations we've seen take brilliant strategies to market and identified the common elements which were present, or missing, in their strategic execution.

Based upon these learnings we have developed a six-step recipe for successful strategy execution. We call this recipe the Execution Factor or (a little self-consciously) the Ex-FACTOR. (See Exhibit 1).

In our experience, organisations that adhere to the six Ex-FACTOR steps rarely go too far wrong. Or, to return to our analogy, they successfully make a cake. But what separates the many organisations who can 'make cake' from the contest winners, those who really 'knock strategy execution out of the park'? In other words, what is the 'Ex' in 'Ex - FACTOR'?

The 'Ex' in 'Ex-FACTOR'

To answer this question, we observe that different bakers following the same recipe will typically not produce identical cakes. It is by bringing their own artistry to bear that experienced bakers can produce outstanding results. Perhaps the same is true in business: executives (mostly) know what to do (follow the FACTOR steps), but it is those who add their own flair to strategy execution that outshine the rest.

Just as different bakers have different styles, we've seen organisations take many and varied approaches strategy execution; our experience suggests that there is no single 'correct' approach. However, we have found that the organisations that excel at strategy execution are those which go beyond the basic recipe.

For some organisations the 'Ex' may come from the CEO relentlessly engaging the executive team in strategic discussions, in other words, being 'like a dog with a bone' when it comes to strategy. For others it may come from thinking like your best marketer when crafting messages to your people, or from engaging staff at all levels of the organisation in strategy execution via 'vertical-slice' project teams.

The question therefore becomes, 'what is your Ex-FACTOR?'. Or, put differently, how will you ensure your organisation is among the minority that truly excel at strategy execution?

We'd like to challenge you to consider this as you reflect on these ideas and to let us know your thoughts on this next time you find yourself speaking with a Right Lane consultant. We would love to hear how your organisation puts the 'Ex' in 'Ex-FACTOR'.

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Exhibit 1: The Ex-FACTOR

		Step	Critical features
F	FRAME	The strategic direction is comprehensive, internally consistent and accessible.	The high level strategic direction is: • comprehensive (everything needed is there) • internally consistent (contains clear causal relationships e.g. between goals and measures of success) • accessible (concise, visual).
A	ALIGN	The desired outcomes, and the approach to realising them, are well understood at the executive level. Executives know what success looks like for them.	Executives: • share a common understanding of the organisation's compelling strategic narrative • are well positioned and visibly lead the strategy • understand how the required activities link to the desired outcomes and are clear about what success looks like.
C	CASCADE	The organisation's strategic objectives are clearly reflected in functional, geographic, and business-unit strategies, and explicitly linked to budget and performance monitoring processes.	The strategy is cascaded to: • functional/geographic/business-unit strategies • resource allocation and budgeting processes • enterprise performance measurement.
T	TASK	Individuals and teams have the necessary skills and influence and are provided with the resources for success.	Success of strategic projects is enabled by: • appropriately assigning responsibility to ensure project teams have the necessary skills and influence • allocating sufficient resources to set up individuals and teams for success.
O	OVERSEE	Clear delivery expectations are set against which progress is closely monitored. Additional support is provided as necessary to overcome unforeseen obstacles and keep strategic projects on track.	Strategic oversight: • is founded on clear delivery expectations • includes highly visible progress reviews • is responsive to unforeseen challenges.
R	REVIEW	The expected and actual outcomes of strategic initiatives are reviewed and clear next steps agreed.	Review processes: • monitor measures of success, key activities and corresponding deliverables • have a clear 'rhythm of accountability' • are outcomes focused • result in clear next steps.

by dr marc levy & chiara lawry

After the event

How to get full value from your strategy workshop outcomes

Right thinking

Hard though it is, choreographing a great strategy workshop, with meaningful, compelling outcomes is only half the battle. The other half is doing something with them – committing to a series of interrelated next steps and getting them done.

Board and executive team strategy workshops are expensive, as much as $50,000 a day, if you include the value of participants' time, consulting fees associated with expert facilitation and event management – and the travel, venue and other costs if you go offsite.

It's not surprising that organisations are prepared to invest this kind of money in a one or two day event. There's a lot at stake: typical strategy workshop topics – What's most important to us? Where will we focus our efforts? What will we fund or defund? – have far reaching implications for programs of work, with annual budgets often thousands of times the cost of the workshop.

When one of our larger listed clients takes their board and executive team offsite every year, they make major decisions about a body of work that costs about 200,000 times as much as the workshop.

Given the questions considered, it's not hard to justify the investment. Getting the best return on this investment requires you to get full value from the workshop outcomes.

Let's say you have a very successful strategy workshop: you come to a view on what's changing in the world and what it means for the organisation, you answer intractable strategic questions, you align on objectives and strategic priorities. Everyone is genuinely excited. What happens next? What are the steps you can take after the workshop? How can you give your team the best chance of acting on what they decided to do?

What to do within the first week of the workshop

Get the workshop outcomes documented and distributed quickly, certainly within the week and preferably much sooner. Make sure that there are concrete decisions and attendant actions coming out of the workshop, and that the corresponding 'single point' accountabilities and timings are unambiguous. The actions should be shared, and the senior group should, where possible, play a central role.

Draft four or five talking points for workshop participants to have on hand when their colleagues inevitably ask them, 'How did it go? What did you do?' It can also help to draft a workshop narrative, for workshop participants, to crystallise the outcomes.

Communicate with everyone impacted by the workshop outcomes. Depending on the size of your organisation, different communications apertures may be appropriate – an all staff town hall meeting, a departmental meeting cascade, a video, an email.

These initial communications convey the seriousness with which management is taking the workshop outcomes.

Agree what Franklyn Covey calls the 'cadence of accountability', the rhythm of meetings and interactions to which you will commit to keep the work you agreed to do at the workshop on track (McChesney, Covey, & Huling, 2012). Book the meetings.

Put someone in charge of the work, someone senior, with the clout, skills and 'dog with a bone' mindset to get it done. This person should ideally be the CEO, or a senior executive team member with the strong, visible backing of the CEO.

Within the first month

Hold the first meeting about the work you agreed to do. Ask those you charged with the 'single point' accountability and timings to populate, pre-circulate and present a plan on a page template for their specific work products. Provide feedback; ask them to quickly iterate plans as necessary; and give them permission to get cracking with implementation, if they haven't already started.

Report back to the workshop participants, and anyone else with an interest in the workshop outcomes who has been involved in a prior communications loop, about how the work is going – the good and the bad, what's been done, what hasn't, and what's next.

Within the first three months

Conduct the first of three progress review meetings at three-monthly intervals. Bring together the senior group. Public accountability gets people moving. Recall what was supposed to be done. Establish what has been done. What are the results so far? What have we learnt? What do we need to change? What support can the senior group provide? What work will be done before the next review meeting? What will be the markers of success we will look at?

Keep communicating about how the work is progressing, particularly any wins. There's a reason change management guru John Kotter (1995) suggested 'over communicating by a factor of ten'.

Within the first six months

At the second quarterly review meeting – the six-month point – refresh the work you agreed to do at the workshop as necessary. Circumstances change. Some decisions will be wrong. Some ideas won't work.

Celebrate the effort that's been put in and the results so far. Make the link to the performance review process so that people's contributions can be formally recognised.

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Most of what we have laid out above is common sense, but it is surprisingly uncommon practice. By committing to do what we have suggested, you can give your organisation the best chance of getting the return on investment you and your colleagues deserve for the hard work you put into your strategy workshop.

References

Kotter, J.P. (1995, May-June). Leading change: Why transformation efforts fail. *Harvard Business Review*.

McChesney, C., Covey, S., & Huling, J. (2012). *The four disciplines of execution*. New York: Free Press.

An overview of the 'after event' process ...

Within the first WEEK	Within the first MONTH	Within the first 3 MONTHS	Within the first 6 MONTHS
• Get the outcomes documented quickly; include concrete actions, accountabilities and timings • Draft talking points for participants to share • Communicate with everyone impacted • Put someone in charge	• Hold the first follow up meeting about work you agreed to do • Ask those accountable to present a plan on a page template • Get cracking with implementation • Let everyone know what's going on	• Conduct the first of three progress review meetings • Agree the work to be done before the next review meeting • Keep communicating about progress	• Conduct another review meeting • Refresh the workplan actions as necessary • Link the work to the performance review process • Celebrate the hard work that's been done

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We employ our distinctive ideas and processes, and our absolute commitment to delivery, to help clients we care about pursue their inspiring missions.

We work alongside clients who do great work within the sectors they operate, and we are excited to be involved in creating outcomes that truly make a difference.

We are an ethical consulting firm with a strong belief in the work we do, and with a passion to give back to the broader community with the skills and expertise available within our walls.

Right Lane was established in 1997 to help private, not for profit and public sector clients to clarify and accelerate their future plans. Over the past 23 years, we have helped the executive teams and boards of around 300 organisations to define and adapt their direction and strategy, identify and clarify their priorities, align their efforts with their aspirations, get their major projects started and finished, and measure and improve their performance.

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