



January 2013 | Whitepaper



STRATEGIC DEPLOYMENT: HARNESSING THE POWER OF VISIBILITY

COMPLIMENTARY WHITEPAPER BY

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The story is a familiar one. Your executive team spends days of hard work developing the strategic plan for the organization. There are reviews of in-depth market analyses and competitive assessments followed by the creation of a **Vision** for the organization. Through intensive dialogue and discussion a strategic plan is created that outlines the objectives and goals for the organization. Breakthroughs and challenges are built into the plan. It is clear that this is what the organization needs to do to successfully move into the future. There is commitment and positive energy around the plan announcement and launch.

And then it happens. Slowly, at first, as the demands of day to day business begin to sap the strategic focus of the organization, the energy around the strategic plan accomplishment begins to fade. At lower levels of the organization, projects take on a life of their own. Redundancies of effort and unanticipated conflicts spring up. Everyone is working hard, focused on what they think is important yet the strategic momentum grinds to a snail's pace over time. The strategic plan has become **credenzaware** - a summary of all the things the organization wanted to do but just didn't seem to be able to accomplish. Then, all of a sudden, it is time for another planning cycle. There may or may not have been any progress toward the strategic Vision. And so, the executive team begins its work again, repeating the cycle.

Having an excellent strategic plan obviously is not enough. A great plan without an effective deployment system is doomed even before it is launched. Any progress is achieved by default, not by design. Unfortunately, there are only a few models of strategic deployment systems for an organization to utilize and the most common ones are defective hybrids of traditional Management By Objectives. For lack of a better model, the defective ones continue to be used because those are the ones that organizations are used to using and have patterned their organizational interactions around. When strategic plans are not achieved, the myth is that all the organization needs to do is to come up with a better strategic plan.

If deployment is important, where would managers or executives begin in their creation of a deployment system that will be effective for their organizations? The starting point is to identify the strengths and weaknesses of the organization's current deployment system. Here are some questions that might be part of that assessment:

- Once the executive leadership has crafted the goals and objectives for the strategic plan, how are those challenges communicated to the rest of the organization? (Consider drawing a map of the cascade...if you can...)
- How are the goals, objectives, initiatives, strategies, and projects identified and captured in each step of the deployment process?
- How are the focus, priorities and intent of the plan communicated? Just verbally or one-on one?

The strategic plan has become credenzaware

- In the cascade, as objectives spawn initiatives or projects, what process is used to ensure both vertical and horizontal alignment of understanding and actions? (How does the organization ensure that everyone is on the same page?)
- How are responsibilities and accountabilities for plan achievement identified?
- How are cross-functional initiatives synchronized?
- How are potential conflicts and redundancies at lower levels in the organization identified and eliminated in the plan cascade? (As opposed to discovering them later.)



- How does the executive leadership team assess the **load** on the organization that is created by each goal?
- As the plan is deployed, what links are there that connect the plan elements from level to level?
- What does the plan look like when it reaches the lower levels of the organization? Are the connections to the strategic goals clear? (Would employees know the organizational priorities and how their work is related to them?)
- How does the deployment system set the foundation for the on-going monitoring of the strategic plan? Is there a way to track progress against the plan?
- If unexpected crises arise, how does the executive or leadership team modify, suspend or terminate strategic activities that are impacted by those crises?

In answering the questions above, the deficiencies of the current strategic deployment system might become obvious. **It should be clear that strategic deployment is all about seeing and making connections, dialoguing and decision-making around plan challenges and then being able to monitor progress on a consistent basis throughout the year.**

The typical MBO deployment hybrids used by many organizations are not usually effective in meeting the above challenges. This is partly due to the fact that MBO is primarily a *vertical cascade* of goals and objectives from the top to the bottom of an organization. It is rare to find systems that are designed to support *horizontal alignment* as plans are deployed. What happens in this scenario is that each organizational silo generates its own response to the strategic challenges assigned to it and within those silos a plethora of projects get generated to meet what are understood to be strategic requirements. Each group and department is focused on its own initiatives and projects (because that is what they will be rewarded for) and has no real visibility as to what others in the group or in the wider organization are doing. This is a recipe for disaster.

One way to address the challenge of creating an effective deployment system is to understand that a key element in any deployment system is **how the plan is visually captured, deployed and monitored**. Getting everyone on the same page is more than just a catch phrase. It is actually part of the solution to the strategic deployment challenge. Creating visual templates that can be used to show the scope and interconnections of the top and subsequent levels of the strategic plan is essential. This is more than just putting the strategic information on a summary chart:

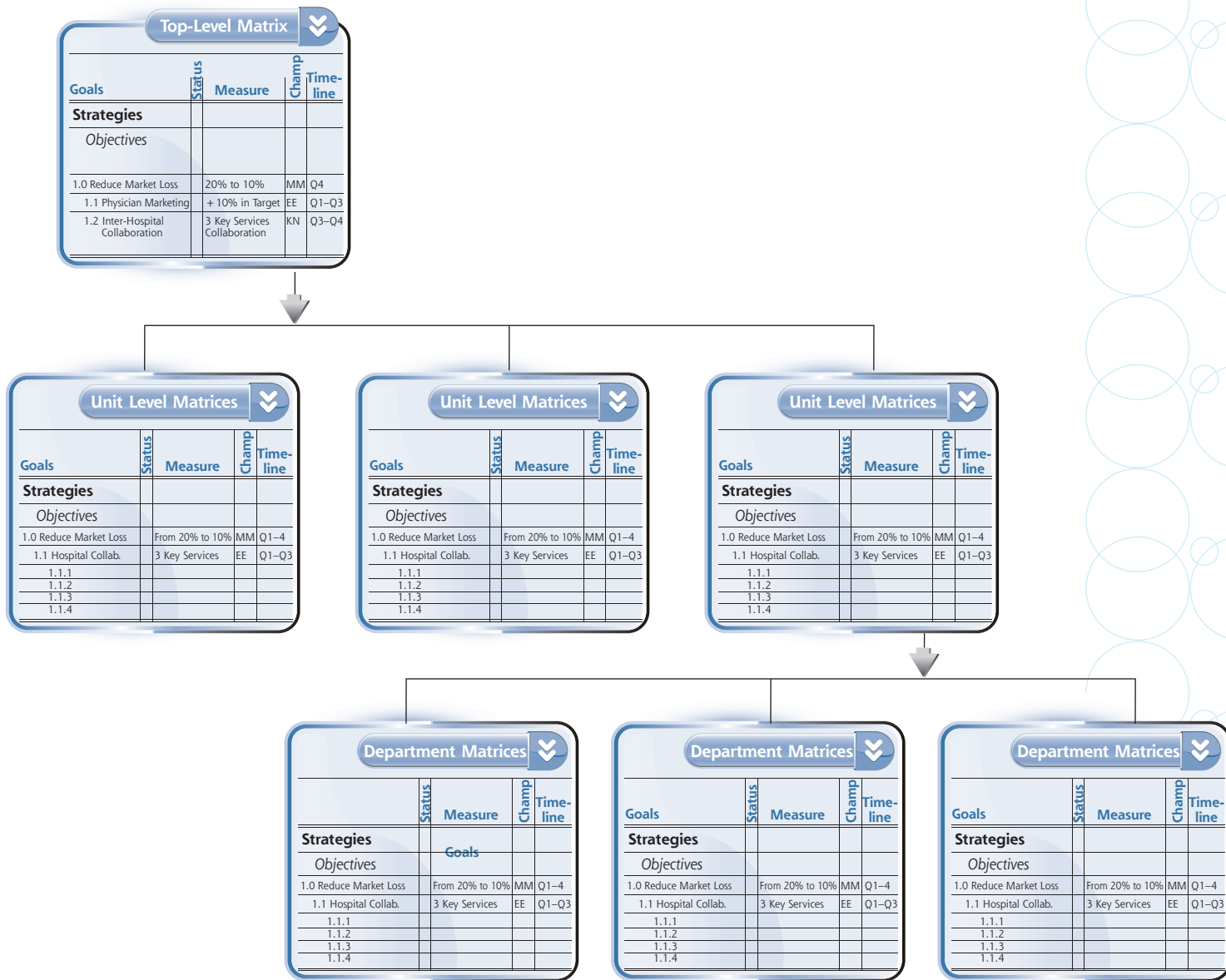
Visibility is all about taking the complexity of what you are trying to manage and capturing it in visual formats that you can analyze, manipulate, communicate, dialogue, deploy and monitor.

Creating such visibility is easier said than done. Consider this illustration of a possible cascade of a strategic goal from level to level in an organization. Notice what happens to the complexity as the plan cascades:



- o A single Goal can evolve into a multiplicity of strategies and projects... Now add the requirement of identifying who is responsible for each of the elements as well as what measures of success will be used and the timing involved for each element and this was just one Goal!

Fortunately, the Management and Planning tools offer options that can be used to capture all this complexity. There are matrix and tree diagram variants that can be developed for strategic deployment. An excellent example of the use of the M&P tools in strategic deployment is the Hoshin Kanri system that utilizes a matrix system to not only cascade the plan from level to level but also sets the locus for dialogue about the plan as it is deployed as well as creating the templates that can be used in the strategic monitoring process. Here is how a Hoshin configuration would look:



The matrices can be constructed in such a way that the connections between Goals, Strategies and Objectives and subsequent levels of actions are obvious as well as the measures, responsibilities and timing of each element.

Here is a sample of a [Hoshin Unit Level Matrix](#):

Unit X Deployment Chart					
Goals	Status	Measure	Responsibility		
			Champ	Team	Time-line
Strategies					
<i>Objectives</i>					
<i>Projects/Ops.</i>					
1.0 Increase Total Sales		25%	RB	AA	Q1-4
1.1 Target AMX Mkt.		2 new prod.	EE	YY, BV	Q1-Q3
1.1.1 Launch A		First sale	KN	BC, DS	Q1-Q2
1.1.1.1 Dev. A		Dev. approv.	JC	YK	Q1-Q2
1.1.1.2 Mkt. A		10% mktshr	YY	WS, SD	Q1
1.1.2 Launch B		First sale	JC	MI, GF	Q3
1.1.2.1 Dev. B		Dev. approv.	SE	YY, SE	Q2
1.1.2.2 Mkt. B		30% mktshr	RF	SE, WL	Q3
1.1.3					

Such a matrix provides the opportunity not only to develop the initial plan together as a Unit but it also enables Unit management to assess the **load** placed on individuals within the Unit. Once completed, the matrix can also be used to align the Unit with other Units of the organization as part of the plan deployment. (This is part of the

organizational [Walkabout](#) step in the [Catchball](#) dynamic of the Hoshin deployment system.) In addition, this matrix can be utilized as a strategic plan monitoring and review template. This matrix meets the visibility requirements of being capable of analysis, manipulation, communication, deployment and monitoring.

For simpler deployments, plan visibility can be generated through the use of a modified tree diagram:

Modified Tree Diagram 

	Measure		Measure		Measure	Responsibility	Timeline
GOAL 1	XXXXXX	Strategy 1.1	YYYY	Project 1.1.1	xxxx	AA	Q1
				Project 1.1.2	hhhh	JC	Q2
		Strategy 1.2	zzzz	Project 1.1.3	zzzz	LB	Q2
				Project 1.2.1	jjjj	TH	Q1
		Project 1.2.2	mmmm	BB	Q3		
GOAL 2	SSSSSS	Strategy 2.1	vvv	Project 2.1.1	kkkk	RX	Q2
				Project 2.1.2	zzzz	GG	Q4
		Strategy 2.2	mmmm	Project 2.2.1	ffff	TC	Q3

Again, the linkages are visible and the measures, responsibilities and timelines are identified.

It would be an interesting exercise to take your current strategic plan and track the evolution of its cascade down through your organization. How does it pass the visibility test? The following questions might help power up your plan:

- o In what ways does your strategic plan visibly show plan linkages?
- o How could the measures, responsibilities, and timing at each level captured?
- o How might your organization leverage this visibility as the plan is cascaded? (How might Units get to see what each other are doing?)
- o How might the leadership group use the visibility to foster feedback on plan feasibility and "load" as the plan is cascaded?
- o How might the executive and unit leadership use the visibility to monitor plan progress?
- o How might leadership use the matrices to reward group and unit performance?

There is need for a word of caution here. Transitioning to a visual strategic deployment system may be traumatic for an organization. It means that business will be conducted differently. Roles, responsibilities and accountabilities will change—which means that managerial patterns for successful interaction will be modified or changed. There could be new levels of vulnerability that will be uncomfortable and threatening for managers when what they do is now visible for all to see. Using visible formats in strategic deployment literally **turns the lights on** in an organization. There is no place to **hide**. This potentially gives rise to resistance within the organization. It is important that leadership recognizes this and responds accordingly. **Killing the messengers** is a sure-fire way to guarantee that the plan will be subverted. The focus on managing performance against plan goals becomes a process of positively responding to issues and providing support as needed. It is an excellent way to truly build a sense of teamwork and cooperation across the organization.

The task of implementing visibility into your strategic deployment system may be a challenging one. But the pain is worth the effort! Visibility is about **turning on the lights** in your organization. If you are as competitive as you are now **in the dark**, just imagine how much more formidable your organization would be when it operates **in the light**.

Arriving soon at MemoryJogger.org



The Hoshin Kanri Memory Jogger™

Provides a detailed, step-by-step approach to implementing Hoshin Kanri in your organization. The process outlined in this Jogger represents the culmination of years of Hoshin evolution and learnings. In addition to this, it also contains a review of the pitfalls and temptations experienced by organizations that have implemented Hoshin.

Take your organization to a higher level of performance. It details the steps in the three Hoshin Sequences: Creation, Dialogue and Deployment, and Audit. It also contains caveats gleaned from implementation experience that add depth to the understanding of each step and the overall process.



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ABOUT THE AUTHOR

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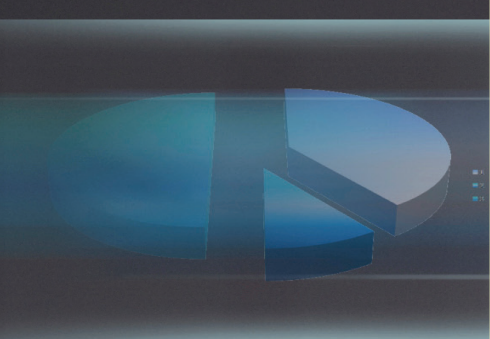
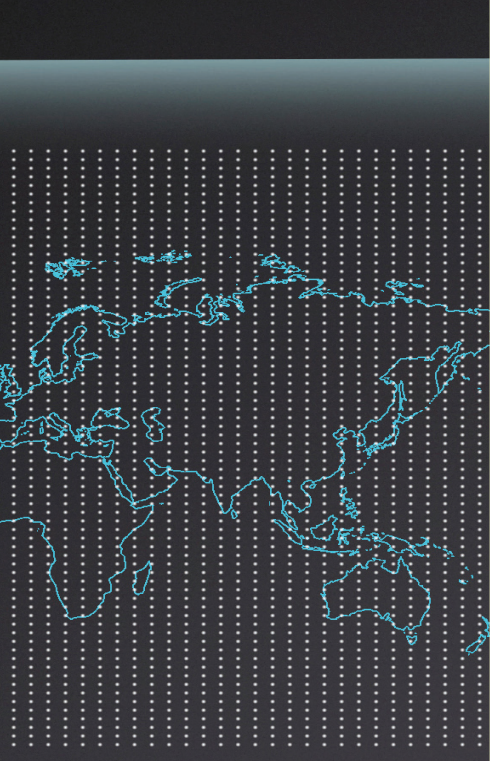
Joe Colletti has thirty years of business experience ranging from machinist to executive staff member of a Fortune 500 company. He has been recognized internationally for his expertise in Strategic Planning Facilitation and Project Management. He has made keynote presentations at domestic and international conferences such as the European Organization for Quality (Brussels), the Institute for Healthcare Improvement National Conference (Orlando) and the Congresso Internacional de Tintas (Sao Paulo).

He has also published extensively on the subjects of strategic (Hoshin) planning and TQM. He was the editor/author of *TQM Implementation Strategy*, a co-author of *Making Daily Management Work* and contributing author of *World Class Manufacturing*. He has also published a definitive text: *A Field Guide to Focused Planning: Hoshin Kanri-American Style*. His article, *Harnessing the Power of Visual Deployment* was published in the National Productivity Review.

Joe has been also recognized nationally for his work in facilitating large scale strategic planning events across a wide spectrum of organizations. He has led planning sessions for Alaska Airlines, Xerox, Coca-Cola and the Ford Motor Company. He has been a Management Education Innovation Track faculty member at Johns Hopkins University and a guest presenter in the Fordham University International M.B.A. program. He also teaches project management internationally for DHL Global Forwarding.

Joe's clients have included Time Magazine, AT&T, Texas Instruments, HCA, VHA and LifePoint hospitals, the Alaskan Federation of Natives, U.S. Air Force, Marriott, Air Canada, MassMutual Financial Group, the cities of Hartford, CT and Reading, PA, and the Federal Quality Institute. His effectiveness as a facilitator has been reflected in consistently superior evaluations and, more importantly, in the results his clients have received.

From an academic perspective, Joe has two Masters Degrees in the areas of Psychology and Adult Education from Boston College and Boston University.



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