



Excellence  
Advantage  
Inspirations

# Strategy Execution

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## WHERE ARE WE GOING?



I have been spending a lot of time lately thinking about the future. It is refreshing to see so many of my clients getting back to strategic thinking and strategic action. As senior leaders, one of our most vital roles is setting the organizational direction.

Our staff and Boards are ready to move out of pandemic crisis mode and they look to us for signs and signals that we are moving forward. It rests on our shoulders to set the strategic direction of the organization. Our organizations are looking for clarity about where we are going. I spoke about this recently, **From Crisis to Clarity**, on the Healthcare Shapers podcast.

*The world has changed* and we are well-served to revisit assumptions, examine the environment, and refine, *if not re-define, our strategic path.*

### Organizational Direction

Setting the organization's direction involves examining and clearly defining your

Mission	Vision	Values
Goals	Strategies	

For some, this also involves defining:

Key Customer Segments	Markets
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**Take the time to make these critical strategic decisions for the organization and its future — establishing a strategic framework for decision-making, resource allocation, and action.**

During the pandemic, some organizations put this type of strategic work on hold with a sole focus on the present moment. For others, they felt that such work needed to

occur in an in-person strategic planning context, and so they delayed. For my best clients, they took the opposite approaches. They utilized the health crisis to *accelerate the execution of their strategic work*. They executed in 6 months what would have previously been a year-long undertaking as they already had great strategic clarity. Still others sought guidance on how to use a virtual or hybrid strategic action planning approach and made huge strides without bringing people together in the same room.

Regardless of what was accomplished or postponed strategically, *all* are now ready to do strategic work again, both strategic direction setting and strategic execution. It is time and our organizations are taking notice.

The caliber of the discussions, the willingness to reexamine entrenched assumptions, the courage to ask *what if*, and the boldness to act, these are some of the notable differences that I am seeing in more recent strategic efforts.

Here are a few insights to consider as you undertake this vital work in a new light.

### Thoughtfully Design the Approach

Rather than using generic approaches to strategic planning, action planning, or setting your organizational direction, it is wise to tailor the design to the specifics of the organization. What are you seeking to accomplish through the process? What is the organization's capability and track record in executing its prior plans? Where can an outsider's vantage point be most valuable?

**Let me share a few examples to illustrate:**

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#### Strategic Thinking

I was working with an organization where the senior leaders in the organization had only limited experience with strategic work. They were superb in clinical and operational matters, but had not yet developed and honed their skills in strategic thinking. And so, we carefully and thoughtfully designed strategic planning activities that drew them out of an operational mindset into strategic thinking (even if just for the strategic sessions where we co-developed the organizational direction). They have since, through successive cycles of strategic work, become strategic thinkers and strategic doers!

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### The Board's Role

Another organization wished to involve the Board exclusively in setting the organization's strategic direction. I counseled them to consider the best ways to involve the Board vis-à-vis senior leadership. In my years of doing this work, I have yet to experience a Board who understands the industry, sector, and market as deeply as the full-time professionals that they have hired as the CEO and Vice Presidents. I have seen all too often the implications of not striking the right balance here. In this case, the Board proceeded to set the strategic direction with the use of another consulting firm and then handed it over to the CEO and senior leadership to implement. The depth of understanding, commitment, and buy-in to a strategic direction cannot easily be acquired without the involvement of senior leadership in the discussions and weighing of alternative strategies. This depth of involvement comes from an approach with senior leadership and the Board having well-designed roles within the process, each bringing their unique contributions to the process. It took this organization quite some time and effort to make up for lost ground by not involving senior leadership in the setting of the strategic direction.



in the room, to discuss and debate alternatives and priorities. They then sought outside guidance on how best to *implement the plan*; in this work we did with them, it involved placing senior leaders in a central role in order to achieve increased understanding, big picture perspective, and ultimately execution of the plan year over year.

A well-designed planning process achieves these things *during* the plan development process, not afterward. Otherwise, precious time is lost moving from direction setting to action.

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### Designing for Styles

Finally, another organization had a key member of the senior management team who often dominated discussions and was not yet skillful in integrating the perspectives of their colleagues. Therefore, we designed an organizational direction setting process with the objective of balanced involvement. The process used a variety of techniques to achieve this key objective within the process.

As you emerge from the crisis, define your organization's strategic path forward with thoughtful attention to the best approach for undertaking this strategic work — consider your organization's unique situation, level of experience, and how to create optimal momentum.

Our organizations are ready and are asking: “*Where are we going, and when will we get there?*”.



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### Level of Maturity with Planning

Another organization, fairly new to strategic planning and direction setting used an approach not well-matched to their organization's level of maturity with planning. They utilized an approach that involved large numbers of people in the organization from the Board, to staff, to customers. While the senior leaders were involved within the highly inclusive process, the design did not place sufficient attention on the vital role of senior leadership in setting the strategic direction – in my experience this is essential to the plan and for its successful execution.

The initial approach did not include adequate time for in-depth discussions by the senior team, without others



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## Questions for Creating Your Excellence Advantage

1. What has changed most significantly in your internal and external environment that causes you to revisit assumptions?
2. Is it time for a reset of your organizational direction (all the way back to mission and vision) or will a refresh on goals and strategies be most appropriate?
3. If so, how will you approach this?

## MAKE IT HAPPEN



### Strategic Execution

There are a *few* special ingredients that make the difference between an uphill slog and smooth sailing when it comes to *executing* on your strategic direction.

There are many organizations that have become quite skillful in setting a clear and compelling organizational direction – bringing clarity to where they are going. But there are fewer organizations that consistently *deliver* and produce the vital organizational results.

With clarity on where you are headed, *the key then becomes delivery* — consistently executing on plans to deliver continuously improving results that are of importance.

Here are a few of the factors that create the difference between consistently knocking it out of the park and hit or miss performance in strategic execution:

### Alignment

In the first section I referenced the importance of thoughtfully designing the approach by which you set your strategic direction. If designed well, this approach will create alignment among your senior leadership team. This does not mean group think. Just the opposite.

Alignment (in a strategic context) can be achieved by reaching a shared understanding about the environment, challenging assumptions, examining alternative scenarios, considering various paths forward, and then arriving at a shared commitment to a strategic direction.

Done well, the senior leadership team defines an organizational direction that they are aligned on. This direction serves as the strategic framework for decision-making, resource allocation, and action.

#### Alignment is an accelerant for execution

In high-performing organizations, there is alignment of plans, processes, people, information, and results (to name a few). In the context of *this* article, I am referencing Clarity contributes significant to alignment. The critical alignment

your plans, initiatives, and leaders toward accomplishing your strategic direction.

*Clarity contributes significantly to alignment.*

As we move from setting the organizational direction into delivering on it, creating alignment *remains* important at every step.

### Prioritization

Another key factor that contributes to organizational success is prioritization. The organizational direction (i.e., mission, vision, goals, and strategies) create the criteria, if you will, for prioritization. In any given timeframe, the organization must decide which strategic initiatives to pursue.

Although there are different ways to prioritize, the key is to make conscious choices about what we are going to pursue. And equally important, about what we are *not* going to pursue. For example, there are many different ways in which we can pursue growth. Are we going to pursue strategies to increase our market share within our current geographic region? Are we going to grow by expanding the

geographic area that we serve? Are we going to create new products and services? Are we going to consider mergers/acquisitions as a growth strategy? These choices about what we are going to do and what we are not going to pursue, (and why!), are a vital part of direction setting and execution conversations.

As we move from direction setting into implementation of our strategic initiatives and plans, we must prioritize. As they say “if everything is a priority, nothing is a priority.”

Prioritization creates focused action. It allows us to make wise choices and then *fully* execute on them! Once accomplished then we can intentionally move on to the next priorities.

So often I find organizations coming back to work on (or re-work) the same things again some months (or even years later) because they did not fully execute the first time. With too many things on their plates, they check things off as complete in order to move on to the next things. And then a similar “issue” or initiative by “another name” pops up because they didn’t fully achieve and anchor the box they checked off.

Intentional and effective prioritization is key to execution. I look for the “bowling balls” – the strategies or initiatives that will knock down multiple pins. For example, one of my clients has identified simply twelve strategies to achieve six overarching goals, because each carefully prioritized strategy is designed to achieve multiple goals at once.

### Action Planning as a Part of Execution

A third differentiator that I see in organizations with a great track record of implementing is that they approach “action planning” as *part of execution* rather than planning. I call this Do-Plan-Do©.

In many organizations, plans are created and *then* leaders go out and try to convince, cajole, and sell the plan... why we must do this...will you help me... they face resistance and learn of obstacles all along the way.

In Do-Plan-Do action planning, we involve key contributors (and potential resisters!) early on. Together, while using collaborative planning tools and techniques, we draw out the insights, varied perspectives, and uncover potential obstacles during action planning. So, we are accomplishing “the selling” and the gaining of buy-in and commitment *during* the action planning efforts.

Viewing action planning as the start of execution is a key to more rapid execution and long-term success.

Taken together, alignment, prioritization, and skillful action planning bolster execution.

High-performing organizations set and consistently execute on plans that deliver continuously, improving results needed for ongoing organizational vitality.



I was with one of my very best clients recently, and couldn’t help but reflect on what we have put into place to ensure that they deliver! Every year! Each strategic plan!

They did not get there overnight, but with careful attention to all of the things mentioned in this article they have built a powerful engine for execution.

### Questions for Creating Your Excellence Advantage

1. How consistently do you and your team deliver?
2. How can you create greater alignment?
3. What are your most important priorities this quarter?

## MANAGE = MEASURE



Next, I will focus on a few additional elements that can solidify and accelerate implementation of your strategic initiatives.

Alignment of measures with your strategic direction.

### Aligned measures

As leaders, it is vital that we are not flying blind. Measures are key to ensure that we know how things are going in the organization (/department / unit). Without measures, we assume that all is well – that our customers' needs are being met in a timely fashion, that our employees are well supported by their managers, that we are maintaining our market share, that our operational processes are humming along. Without measures, we simply assume.

Too few organizations use measures to manage! Sure, they have some measures...in select areas...that someone looks at sporadically...and occasionally this information informs their strategic efforts or operational improvements.

But organizations that are serious about strategic execution, use measures to manage!! At every level in the organization...all leaders and managers and units manage with measures. These measures are aligned to the strategic direction of the organization (e.g. their mission, vision, goals, strategies, and values).

All can clearly see how things are going at any point in time and how their area is contributing (or conversely, where improvements are most needed).

Organizations who excel at implementation, have identified, defined, and aligned their measurement system to their specific strategic direction. For each of their strategic goals, they have a set of well-defined measures that provides them with the needed information on how things are going relative to this strategic area of focus.

For example, if one of the organization's goals is Access, they have a set of measures that tells them on an ongoing basis how well their customers are gaining access to their services, how long of a wait list there is for accessing key services, whether they are broadening their access to a wider base of customers, whether their new service offerings are being utilized as well as their traditional service offerings.

In high-performing organizations, measures are aligned to the strategic direction of the organization and cascaded to all levels within the organization. Putting this in place is key to accelerating strategic execution.

One way to think of it is that your measurement system is your hardwired communications system. Measures that are aligned to the strategic direction of the organization and shared within the organization are "continually broadcasting" what is important. When our words fall short, the measurement system keeps communicating.

### Questions for Creating Your Excellence Advantage

1. Are you making progress toward your strategic direction? How do you know?
2. Do you manage by fact or assumption?

## ARE WE THERE YET?



### Routine & Systematic Evaluation of Strategic Progress

As leaders, some portion of our leadership team agendas should be dedicated to ensuring progress toward our defined strategic direction. At a minimum, this should include two things: a review of performance on our key measures *and* an (honest) assessment of our progress to plans.

For some leadership teams, these are the focal points of their routine meetings, as the review of metrics and progress against plans are viewed as vital to carrying out their collective responsibilities as a team. These teams find that most topics align with one or more of their strategic goals and therefore this format for their leadership agendas works well. (Note: Not all organizations are at that level of organizational maturity to make this a sound approach, just yet.) Other leadership teams set aside a specific monthly (or quarterly) leadership meeting with a longer and sole focus on the systematic review of their strategic progress.

### Both Parts Are Essential

#### Review of Key Measures

In reviewing *measures*, it is important to use a format that allows for the long-view on performance data, examined *over time*, to prevent over-reacting to a single data point. Instilling sound principles of fact-based management for reviewing and interpreting metrics becomes a key skillset (and expectation) of all members of the leadership team. In high-performing organizations, this skillset is in place at all levels of management, not just among the senior leadership team.

The other key aspect of this periodic and ongoing evaluation of progress against the strategic direction is in assessing progress to *plans*. My best clients do this using their well-defined action plan (or) strategic initiatives (list) which has been clearly aligned *to* and derived *from* their overall strategic plan / direction.



Each month or quarter, they assess:

- whether they are on track to accomplish the initiative,
- whether there are barriers in the way (and if so, how leadership can help),
- if any adjustments are needed (such as additional resources, additional time, a specific subject matter expert) in order to realize the objectives.

When the initiative has been fully implemented, they also assess and share the learnings that have been identified which can be applied more broadly in the organization or to other initiatives.

### Honest Assessments of Progress

In organizations striving for organizational excellence, leadership teams recognize that honesty in these periodic assessments is critical. Too often I see leaders or leadership teams in typical organizations who feel it best to sugar-coat the assessment of progress or not to ask for the help that is needed or who fail to recognize barriers to future progress. This does not help the organization in the long-run. Sooner or later, leaders discover that the initiative has not been accomplished, or is behind schedule or budget.

In addition, as is all too common when incentives are intertwined, we give “ourselves credit” as a leader and leadership team for accomplishing something that is not yet fully in place, in the manner we intended, when we crafted

the initiative or action plan. But we are eager to “check it off” and move on to something else. What I notice, when I begin to work with organizations who have previously adopted this mindset, is that the same initiative comes up again on the plan a year or two later, under a new name or new guise, because the organization did not in fact create the needed change the first time. They would have been better served to fully accomplish the plan and meet the objective, so as not to revisit the same item repeatedly when conditions once again re-surface the same priority.

*As leaders, it is critical that we create the right environment within our leadership teams for these ongoing, systematic, and honest evaluations of progress. Both parts are important — progress to plan and progress against the key measures of our strategic direction - in order to determine if we are truly making strategic progress.*

## Questions for Creating Your Excellence Advantage

1. Are we making progress? What do the numbers say?
2. Which strategic initiatives need additional attention? Which are well ahead of schedule? What can we learn from each?

## COMMUNICATING WHAT MATTERS



Here, we'll focus on the importance of communication — specifically organization-wide communications.

One cannot overdo it when it comes to communications. As we know, people need to hear things multiple ways and multiple times.

There are many forms and reasons for highly effective organization-wide communication. Here are a few that relate to your *strategic direction*.

### Communicating About Change

Very often our strategic initiatives are about organizational change. And when it comes to change, people prefer to know what is coming before it impacts them. Proactive communication is key. We can utilize well-timed communications to **create staff awareness, the desire to contribute, and to reinforce the strategic change.**



Ideally, these communications related to changes have a two-way communications component — a way to ask questions and engage to facilitate greater understanding and acceptance.

Routine and frequent communications can aid, and in some cases even enable, the implementation of strategic initiatives. By communicating transparently about upcoming changes, improvements, new services, new processes, and the like, we create an environment more supportive of the upcoming change. We create climate where questions can be asked, answers provided, and concerns addressed, thereby increasing support for the change.

Communication is one of many tools that can assist you in the change management process for creating lasting and sustained strategic change.

## Communications Approach

When I work with clients on their communication's approach, there are a number of things I highlight. Here are two of them:

### 1. Measures as a Communications Method

As mentioned above, I encourage organizational leaders and managers to recognize that their measurement system is their hardwired communications system. When measures are aligned directly to the strategic direction of the organization and shared regularly within the organization they are “continually broadcasting” what is important.

When our words fall short, the measurement system keeps communicating.

### 2. Use of a Framework for Communications

I also recommend aligning the overall communications approach to their strategic direction. Consider it as the overarching framework for ongoing communication.

For example, if you have 4-6 major Goals defined in your strategic direction, then utilize that as the primary framework for communications. For many in healthcare and human services, they often used a balanced set of goals around Quality, Access, Service, People, Financial Health, Community.

Using this as the framework for communication, communicate progress, updates, anecdotal stories, and improvement efforts for each Goal on a rotating basis. Linking of course to key metrics as well. One week (or

month) highlighting the People Goal about becoming an employer of choice for your region. The next, focusing on the Quality Goal, sharing a cross-functional team's success in improving a key outcome of service delivery as perceived directly by customers.

*Strategic goals can become the over-arching framework for organizational communications.*

In these ways, and others, you reinforce the strategic direction of the organization.

As the strategic framework becomes central to your communications efforts, it is internalized and more deeply understood throughout the organization.

When communicating decisions and priorities, you can always be connecting back to the Why — the connection to your strategic direction. And when staff better understand the strategic direction, they feel part of something bigger.

Organization-wide communication is yet one more means to enable your strategic efforts.

## Questions for Creating Your Excellence Advantage

1. In what ways does your communications approach aid or hinder the implementation of your strategic direction?
2. Do your staff know where the organization is headed and feel a part of getting there? When do you use two-way communications versus broadcasting?
3. How can you better incorporate measures into your communications approach?

## HOW DO YOU CONDUCT PLANNING?



There are shelves of books written on planning. There are innumerable approaches and models. Yet, I am still struck by the fact that high-performing organizations, who have earned the highest-level of **recognition for performance excellence**, tailor their approach to their organizational situation. There are core elements they include.

Having done strategy and planning work myself for close to 25 years, and having learned from many of these high-performing organizations firsthand, I do not prescribe a particular planning approach either. Rather, I first seek to understand the particular organization, what the executive leader is seeking to accomplish vis-à-vis planning, the pace of change in its sector/industry, the market dynamics that the organization operates within, its current level of organizational performance, etc.

That said, I offer some insights for you to consider as you examine and improve your organization's own approach to planning.

### Environmental Scan

While strategic direction setting often involves making decisions about the future and other unknowns, it is wise to create common understanding about the *knowns*.

An environmental scan brings together data, information, and insights about both internal and external factors.

- Internally this often includes a review of organizational performance on all dimensions (for example: quality, customer, financial, workforce, culture, and others).
- Externally this often includes market presence, competitors and collaborators, customers' needs, and others.

The environmental scan should involve, or at least inform, the key participants in the planning process and create a common understanding of the environmental context. Often this includes articulating strategic challenges, advantages, and opportunities.

### Setting organizational direction

Senior leaders have a responsibility for providing clarity about the organization's direction. This is often expressed in the form of an articulated mission, vision, values, and goals. This articulated direction should not simply become words on a plaque but rather should guide decision-making including around resource allocation and all forms of prioritization.



## Prioritization

Planning is a prioritization process. It is about making choices among alternatives.

I often draw it as a funnel (see below).

At the broadest level is the organization's mission and vision. In order to fulfill that mission and achieve that vision, there are numerous goals (strategies, tactics, action plans) that *could be* pursued. Given limited resources of time, energy and money, senior leaders **must choose which are most important to pursue and accomplish in any given timeframe.**



## Integrated planning

Depending on the complexity of the organization including its size, scope and sector, the organization's planning system may simply have strategic planning and action planning phases that are well connected. For other organizations an integrated planning system where strategy is translated into tactical plans in advance of action planning is more impactful. These tactical plans may include HR/workforce planning, technology planning, capital planning (to name a few).

Regardless of the complexity or simplicity, the key is alignment and integration of plans. *Plans should guide actions and move the organization forward together.*

Budgeting is a planning process and one that I find organizations often struggle with how best to integrate it within their planning approach.

## Outcomes

A key differentiator of high-performing organizations is translating the strategy and action plans into desired, measurable outcomes. These outcomes delineate, in the form of key metrics, what the plans are intended to accomplish. They should be articulated in advance.

They are used to assess if we are making substantial progress and whether we need to adjust, refine, add to, or accelerate our plans.

## Questions for Creating Your Excellence Advantage

1. Which aspects are key within your planning approach?
2. Are your plans leading to improved performance results?
3. Which elements of your planning approach need refinement?

## WHEN TEAMS WORK!



Finally, I shed some light on the work unit most often responsible for strategy development and execution: Teams!

Patrick Lencioni's model of teamwork has stood the test of time. It describes both the dysfunctions so commonly found on teams, as well as the give behaviors that create cohesion and effectiveness. (Source: Patrick Lencioni's *The Five Dysfunctions of a Team*)

I highly recommend Patrick's model to teams wishing to examine where they are and how they can become higher-performing.

When team members are fearful of showing vulnerability with each other it prevents the team from building trust.

I was working with a leadership team where one member of the team was always "guarded". This member of the team rarely shared their point of view on topics, never admitted weaknesses or the need for help, and sometimes even played into the vulnerabilities that others disclosed. These behaviors kept the team from forming trust with each other. Without this foundation, they were at best a working group, and at worst dysfunctional.

In contrast that with another leadership team I have had the opportunity to work with over many years. They are open and honest with each other. They are willing to acknowledge their shortcomings and ask for help from each other. This team has built genuine trust. As a result, they were able to build the other *key attributes of high-performance*.

When there is trust, teams can engage in the fruitful debate of ideas. Though this ideological conflict teams focus on seeking the best solutions, sharing openly and freely,

asking probing questions, and genuinely hearing alternative viewpoints to strengthen the solution.

I was a member of a team where the team leader sought to "keep the peace". To his credit this was due to the fact that the team could readily move from a debate of ideas into a clashing of personalities. What we missed out on as a team, however, was the opportunity to be fully heard and weigh in on big decisions through a robust exchange of ideas.

When teams have healthy and productive exchange of ideas, the team members can more readily buy in to and commit to the decisions that are ultimately reached, as they know that their perspectives have been thoughtfully considered by others on the team.

These teams *do not seek consensus as that can bog them down - decisions are often too cautious and/or too slow when seeking unanimous agreement*. Rather they ensure that all are heard, various inputs thoughtfully considered, and then they make a commitment to the decision that is reached (regardless of their initial stance as a member of the team).

Another team that I have had the opportunity to work with has honed this healthy exchange of differing points of view. The work they produce and decisions they reach blend the very best from each team member. They walk away with clarity about who does what, when.

From this individual and team commitment to decisions, comes accountability. Each team member gains comfort in calling on their team members to uphold their commitments to goals, work products, and behaviors as they recognize that the lack of follow-through on any of these things hurts the team as a whole.

Not all well-functioning teams develop this sense of shared accountability. Rather, they grumble about teammates whose behaviors reflect poorly on the team reputation, yet don't venture out to have a 1-1 conversation with a colleague. Reaching this level of mutual accountability allows teams to pursue ambitious collective results.

High-performing teams focus on results! As Lencioni describes this is the ultimate goal of building trust, engaging in a conflict of ideas, ensuring commitment, and pursuing shared accountability.

But not all teams focus on the "right" results. Some teams find that individual members are more focused on their individual results, status, and getting ahead in their careers, then on the team's collective goals and results.

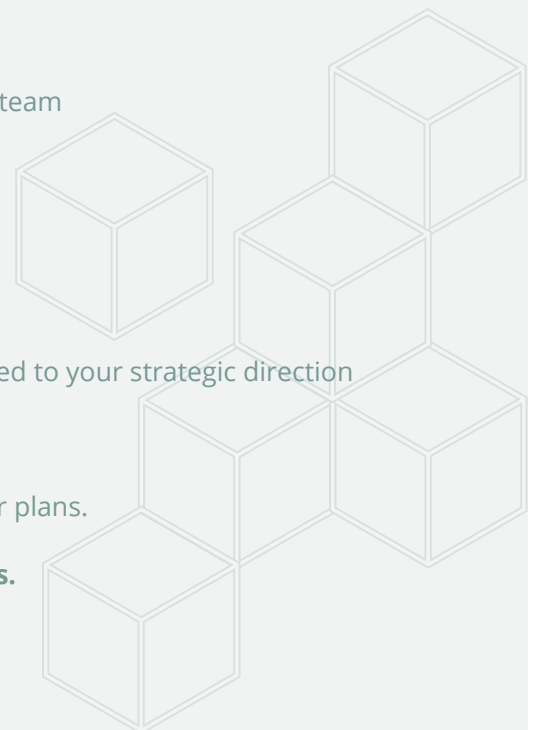
(Sources: **Patrick Lencioni** and **Wiley partnership**)

## Questions for Creating Your Excellence Advantage

1. What is the most cohesive team you have been part of? What have they accomplished?
2. Which dysfunctions are holding back your team? Imagine... what if...?
3. Which of these five behaviors will you focus on as a team member? As a team leader? As a team?

## STRATEGY EXECUTION IN SUMMARY

- Thoughtfully consider the **best approach** for setting your strategic direction
- Think of **action planning** as part of implementation
- Create alignment, first and foremost among your senior leadership team
- Ensure careful **prioritization** of strategic efforts
- Utilize **scenario-based planning** where prudent
- Develop **contingency plans** where vital
- Ensure that **measures are used for managing** and therefore are tied to your strategic direction
- Communicate regularly and systematically
- And be intentional in ensuring **progress**, against measures and your plans.
- Build high-performing teams to **implement the strategic priorities**.





Kathy Letendre creates transformative experiences for her clients, catapulting leadership and organizational performance to new heights.

Kathy is an expert in organizational excellence, transformation, leadership, and performance. As an experienced healthcare executive and champion of transformational improvement, she shares her expertise with leaders, helping them achieve unprecedented levels of excellence for themselves and their organizations. She has a reputation as a collaborative and passionate agent of change.

A graduate of Duke University and the University of Michigan, Kathy is the President and Founder of Letendre & Associates where she advises organizations and leaders to create their excellence advantage.

Clients benefit from Kathy's executive experience in healthcare where she generated unprecedented results. With Kathy's counsel, her clients set new strategic directions and consistently execute their ambitious plans, achieving results of organizational significance.

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