

Your Leadership Map

While providing KM consulting services to the Navy command, I met and worked with Jeff Pottinger, Senior Director, Cowan and Associates (C&A). C&A provides strategy, supply chain management, program management, IT advisory support, performance management, change management, and business process improvement services to help clients achieve superior results in the public and executive education sectors. C&A was ranked 304th on the 2009 *Inc.* 500 list of fastest growing private companies in America. While I was working on the KM effort with the Navy command, Jeff was providing consulting services focused on strategic planning and organizational change. I was immediately impressed by Jeff's depth of knowledge on the subject and his ability to communicate sometimes very advanced concepts in simple and easy-to-understand terms. Jeff's ability to motivate and lead teams stems from a career that includes 30 years of progressive leadership and management experience in DoD, big-box retail, and consulting. I have seen Jeff bring together various best practices and techniques based on his expertise in supply chain management, retail operations, program management, executive education, and business development to streamline and improve operations. I asked Jeff to provide his thoughts on strategic planning and how the concepts within this chapter are relevant to any organization or individual because I know he will provide the simple, sound advice that will resonate well with leaders reading this book.

Strategic Thinking and Planning — More than a Check in the Box

Q. How do you ensure strategic planning can be productive at all levels within an organization?

Throughout my career in the Navy, Circuit City, or in my consulting work, I have been continually amazed at the lack of real strategic thinking and planning. Most organizations I have worked with, particularly Government organizations, treat strategic planning as just another task. It's something everyone else does, so I better do it too. All too often, it becomes a drill to "update" the old strategic plan, add some great pictures of our products and people, create a nice slogan, throw in a glossy cover, print it, distribute it, and then watch it disappear into file cabinets or onto a bookshelf to collect dust. There is no real environmental scanning... no real thinking about the future... no real scenario planning... no real development of high-level objectives... no ownership assigned for these objectives... no creation of team and individual tasks to push these objectives forward... and, generally, only the involvement of a few select indi-

Ed Zimmerman

viduals. And, most disappointing, I find little or no accountability for achieving the objectives or the tasks. The focus of many organizations' strategic planning efforts is not on how to drive future growth, or how to build market share, or how to prepare for the latest competitor within your space, or how to align the company. Rather, the focus is on just getting the task done so it can be checked off the task list and they can move on to the next task or crisis. Without real strategic thinking and planning, organizations are doomed to mediocrity (Government), or doomed to failure (Circuit City).

I don't intend to use this section to outline a strategic planning model and ask the reader to use it. There are plenty of strategic planning models out there, any one of which could be used to help move your organization forward. Just Google "strategic planning" and you will have a plethora of alternatives from which to choose. Ed offers his insights and ideas in this chapter and throughout the book. Rather, my challenge to each reader is to ask yourself whether you are really committed to adding strategic planning to your leadership toolbox. If you are, great, you can skip the rest of this chapter. But, if you aren't, ask yourself why.

Q. Elaborate on how leaders can use strategic planning as a tool for success.

My fundamental guiding principle/leadership philosophy is: Anything is possible... and, I don't believe in the word "can't." In almost every case, when I hear someone say they can't do something, it is either because they don't know how or because they choose not to. If they don't know how, it is the leader's responsibility to teach them or find them the training so they will know how. If they choose not to, it is the leader's responsibility to find out why. If they are choosing not to because of a valid business impediment, then it is up to the leader to help them remove that obstacle. If they are choosing not to just because they don't want to and have no valid business reason to not do it, then it's up to the leader to help them find another job.

It is POSSIBLE for each of you to incorporate strategic planning/thinking into your toolbox. Whether you lead an organization, a department, a team, or are just an individual worker, you CAN choose to incorporate strategic planning/thinking into your toolbox. I have found that the best way to push a new idea forward is to give it a try yourself and let the results convince your boss that it's the right thing to do. If you've never done any strategic planning/thinking before, do the Google search, read some articles or a book, and give it a shot. A couple of books I've used include Michael Porter's *Competitive Strategy* and Kaplan's and Nor-

Your Leadership Map

ton's books on the balanced scorecard. The more you practice it and read how others do it, the better you will become. If you are just an individual working your own projects, conduct your strategic planning/thinking on your own and incorporate it into how you approach your individual project work. If you work in a team, suggest strategic planning/thinking during your next team meeting and offer to take the lead in holding a planning session. If you lead a team or department, ask your team if any of them have experience with strategic planning/thinking. For those who don't, offer up some training. For those who do, ask them to take the lead in setting up and running a session. You get the picture. This stuff isn't rocket science— it just takes someone to get it started, a little training, and a commitment to give it a shot. I think you will be surprised at the impact it has on your ability to do the right things and do them well.

Alignment — The Key to Linking Strategy to Execution

Q. How do you transform planning into execution and results?

I like using the term “alignment” as a link between strategy and execution. When my car is out of alignment, the wheels are attempting to head off in every direction, the ride is bumpy, and it is very difficult to get where I'm going. And I'm not too happy with the experience. The same is true for an organization. You can have a great strategy, but if time isn't taken to align the strategy with the people, processes, and technology of the organization, you can fully expect a bumpy ride— possibly in the wrong direction— and you will probably have a few disgruntled employees along the way.

What exactly is meant by the term “alignment”? George Labovitz and Victor Rosansky, in their book, *The Power of Alignment*, describe alignment as a set of actions that:

- “Connect their employees' behavior to the mission of the company, turning intentions into actions.
- Link teams and processes to the changing needs of customers.
- Shape business strategy with real-time information from customers.
- Create a culture in which these elements all work together seamlessly.”

To be effective, each department, team, and individual must be aligned toward the same objectives, or like our cars, we'll find a bumpy road along the way. Higher-level objectives, down to individual actions, must support the strategy to be effective.

Ed Zimmerman

The simplest method I've seen used is to cascade the organization's strategic objectives down through each level of the organization all the way down to the individual. Identify specific actions that an organization/team/individual must take to achieve the objective, determine how you will measure success, identify who is responsible for the action, and reward them/hold them accountable for their performance. I used this method with great success while serving as the Supply Officer aboard a United States Navy helicopter carrier. One of the key objectives of the ship was to maintain its warfighting capabilities at the highest state of readiness. As the supply/logistics department supporting the ship, one of our roles was to provide repair parts to maintain shipboard equipment. I met with my direct reports responsible for repair parts inventory to discuss what key actions we needed to take to support the ship's readiness. We agreed (after discussion with our customers and some negotiations amongst ourselves) that we could best support the ship by minimizing the time from when a repair part was requested to the time we provided it to the customer. That became the key measure of how we would evaluate our performance for supporting equipment readiness and my direct report became responsible for the performance measurement and actions required to improve it. After further discussions with division personnel, they agreed that the key actions needed to be taken included improving our onboard repair part stock, and minimizing the shipping time when repair parts were not available aboard the ship. The division officer and his personnel determined who was responsible for those actions and gave them ownership for improving their specific performance measurements. We created a process for capturing the data and we met twice monthly to review the department goal. If necessary, we drilled down into the division goals and all the way down to the individual goals. We discussed actions taken to improve performance, met with our customers, anticipated problems over the next two weeks, and specific actions to minimize their impact. Fully aligned with what we needed to do, we quickly improved parts availability and delivery and significantly improved the ship's warfighting capability.

From my personal perspective, aligning my organization was all about communication and teamwork. It wasn't rocket science. You can start building an effective tool box by taking the techniques Ed outlined throughout this book and adapting them to fit you. The key, once again, is being personally committed to taking the steps necessary to gain alignment. Determine the organization's key objectives. With your team, identify what you need to do to help the organization achieve their objectives. Figure out who is responsible within your organization and how you will measure their success. Help them determine the key actions necessary to

Your Leadership Map

meet the objective. Do this with each COI within your organization and you will take a giant step toward alignment, and successful execution.

Innovation and Change — A Difficult, Ongoing Process

Q. How does strategic planning promote innovation and change?

What I have found, particularly in my work with Government, is that innovation and change are hard. The culture of most organizations doesn't accept change and fears innovation. Whether it's fear of losing a job, fear of doing something new and uncomfortable, or just plain complacency, I haven't found too many Government organizations that truly embrace innovation and change as a part of their corporate culture. Eventually, it boils down to individuals so budget-oriented that they fear "new" projects will pull funding from their programs and they either vehemently defend their programs, or actively fight the innovation/change. Even when the facts and numbers support the change, you can almost hear this common refrain: "We've tried that before and it didn't work" or "we've always done it this way and we've been successful." As a result, the organization doesn't change to face new conditions, or if it does change, it changes very slowly. The result: mediocrity.

I have always felt that innovation and change were inexorably linked with strategic planning and strategic thinking. As any organization, large or small, begins to anticipate the future and align their organization to meet it, they inevitably change something... products, markets, technology, processes. It is difficult to maintain long-term success without change/innovation. As the old saying goes, you can't continue to do the same thing over and over again and expect different results. A dynamic strategic planning/thinking process will stimulate an ongoing drive toward innovation and change within your organization.

The key to driving a change in corporate culture to accept innovation and change is to involve the entire workforce in the development of the strategic plan and the cascading of the resultant action plans. Leaders throughout the organization must communicate the corporate mission and vision in clear terms, then involve everyone in their team/COI in the process of developing the objectives and actions necessary to achieve the mission and vision. This creates ownership of the plan and a clear understanding of roles and responsibilities. As a result, there is a greater willingness to accept the innovations and changes they helped develop.

Strategic communication is more than just outward. It is inward as well and is a key responsibility of leaders, regardless of their relative position within the organization. Even if your organization doesn't have a



Ed Zimmerman

formal strategic planning process, there is no reason you can't implement one within your COI. The benefits gained from involving your team in the process of defining the way ahead for them are immeasurable. And, it's the right thing to do.

**Anything is Possible —
Thoughts on Leadership and Management**

Q. Finally, as you look back in your professional and personal life, share any final thoughts you have related to leadership/management and the impact it has had on your life.

I strongly concur with Ed's thoughts that leadership and management, are intertwined and all of us, no matter what level of the organization, require skills in both. Early in our careers, we generally have more management traits and fewer leadership traits. As we progress in our careers, we take on larger leadership roles that require fewer management responsibilities. However, I've found that many organizations don't have a formal process for training their emerging leaders to give them the necessary skills to lead. The organization promotes based on proven management/technical skills and expects the leader to inherit the leadership skills necessary for their new role. If your organization doesn't have formal leadership training, take the initiative and find your own training. Whether it's pursuing an advanced degree, taking an executive education course, picking up a book on leadership, or finding a mentor who demonstrates the leadership traits you admire, take responsibility for your own training. I have found throughout my career that the most successful leaders are lifelong learners and they take responsibility for their own training.

I'd be remiss if I didn't circle back to my underlying philosophy. Remember, anything is possible and "can't" isn't in my vocabulary. You either don't know how or you are choosing not to do something. Whenever you are faced with a situation where you feel something can't be done... ask yourself why. If you don't know how, take responsibility for getting yourself trained. If there is a business impediment that is keeping you from moving forward, find a way to remove the obstacle... with your team, your boss, and your peers. If you find yourself saying that you know how to do something and there is no business impediment, you just don't want to do it... you might be part of the problem.



Your Leadership Map

Ed's Final Thoughts

Jeff's insight reinforces the importance of thinking strategically as a way of life. This is a trait that will serve you well. Taking the time to figure out where you want to be in a year, five years, 10 years, and so on makes the difference in achieving the success you desire. Most people have no direction in life and don't require a leadership map because they don't know where they are now and where they want to go. As a leader you must first understand the importance of focusing your energy toward obtaining your goals. Once you understand this and live this at the individual level you can then apply this to your organization or team. You will be most successful in strategic planning if you lead by example with your own life. First take charge of your life; becoming a visionary leader will follow naturally.