

# The Execution Tune-up™

Getting from Vision to Execution



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## Bio



- 1980 UW-M Graduate
- 1983 Started ACG
- 1989 192 Inc 500
- 1990 Computer Show with Ram and Rom,
- **First TEC meeting, 1/10/1991**
- 1998 Revenue > \$50MM, 350+ employees
- 2003 ACG Sale
- 2004 Purchase Tranquilease, Earned 3 patents
- 2010-2012 Led 5 turnarounds
- Vistage Chair TEC 6/20, Northern Region Chair of the Year, 2017
- 12 Growth Clients, 3 Boards
- Founded "Allied CFO's" Peer Group
- Corporate Anthropology, planning, adjunct member of executive team.

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## Let's do an Execution-Tune up!

**Our Goal for today:**

**Take away at least one thing you can use in your organization**

**Provoke some thoughts on expanding your teams' leadership capacity**

**Provide some tools to help your organization become excellent at execution**



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**Challenge:**  
Identify one thing you will take from this and implement **in the next month (Subject to the Vistage 24 hour Rule).**

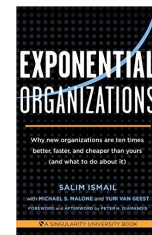
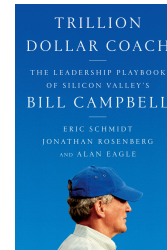
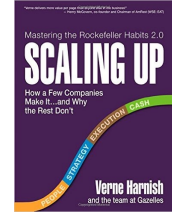
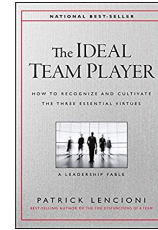
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## Reading List

- Good to Great by Jim Collins
- The Advantage by Patrick Lencioni
- The Ideal Team Player by Lencioni
- The Five Dysfunctions of a Team by Lencioni
- The Hard Thing About Hard Things by Ben Horowitz
- Trillion Dollar Coach by Eric Schmidt
- Scaling Up by Vern Harnish
- Exponential Organizations by Salim Ismail
- American Icon by Bryce G. Hoffman



<http://www.alliedcg.com/reading/>

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## History

1997: Solutions at Work – Jim Alampi and partners, including associate Gino Wickman, begins to combine Harnish, Collins, and Lencioni work.

2000: Jim Alampi founds Execution Maximizer and begins award winning speaking run with Vistage.

2002-2016: Adds 6 former CEO Advisors to help more than 500 clients in North America and Europe.

2017: EM Advisor, Rom LaPointe acquires 80% of the business and becomes CEO.

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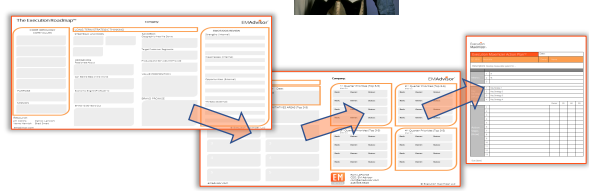
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**EM** Our Agenda Today

Barriers to Growth 

Rockefeller Habits 

Building your "A" Team 

The Execution Roadmap 

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**EM** Have you Ever....

**CEO!** 



Felt Like this?

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Does Your Team Act Like this?

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Is There an Elephant in the Room?




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## How do you run your business?



*Lifestyles of the Rich and Famous*



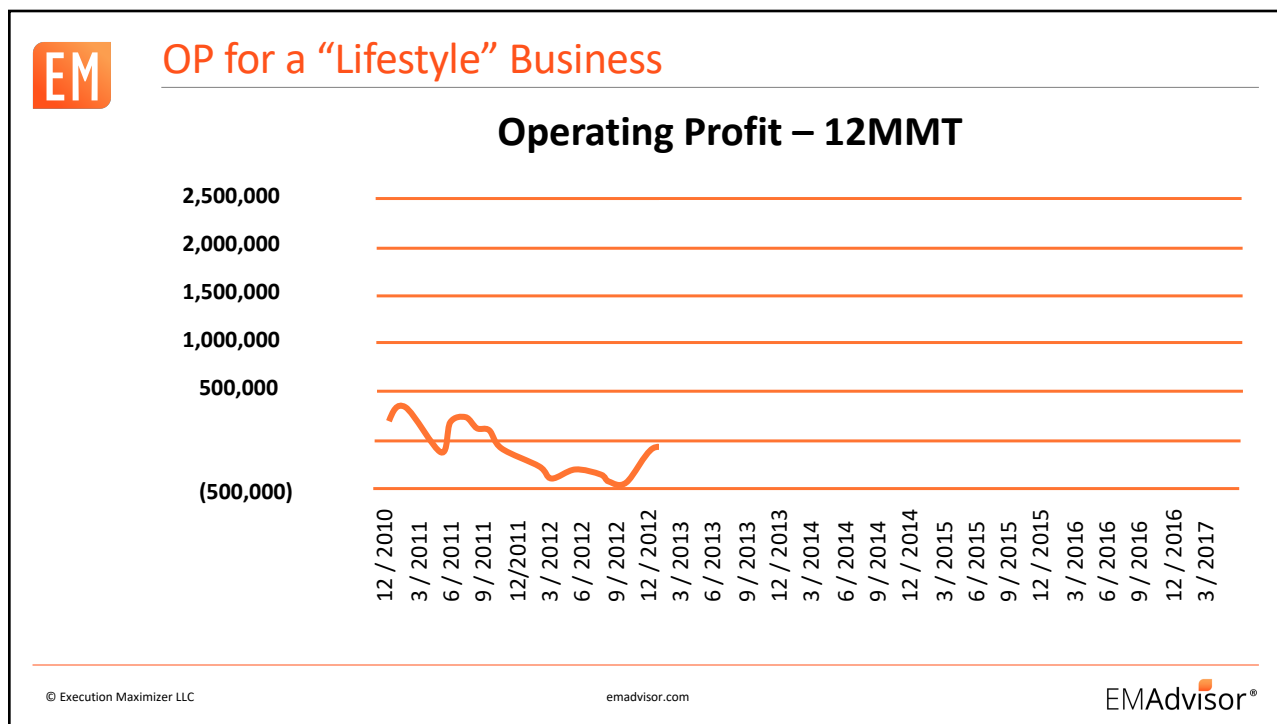
*Leave a Legacy*



*Built to Sell*

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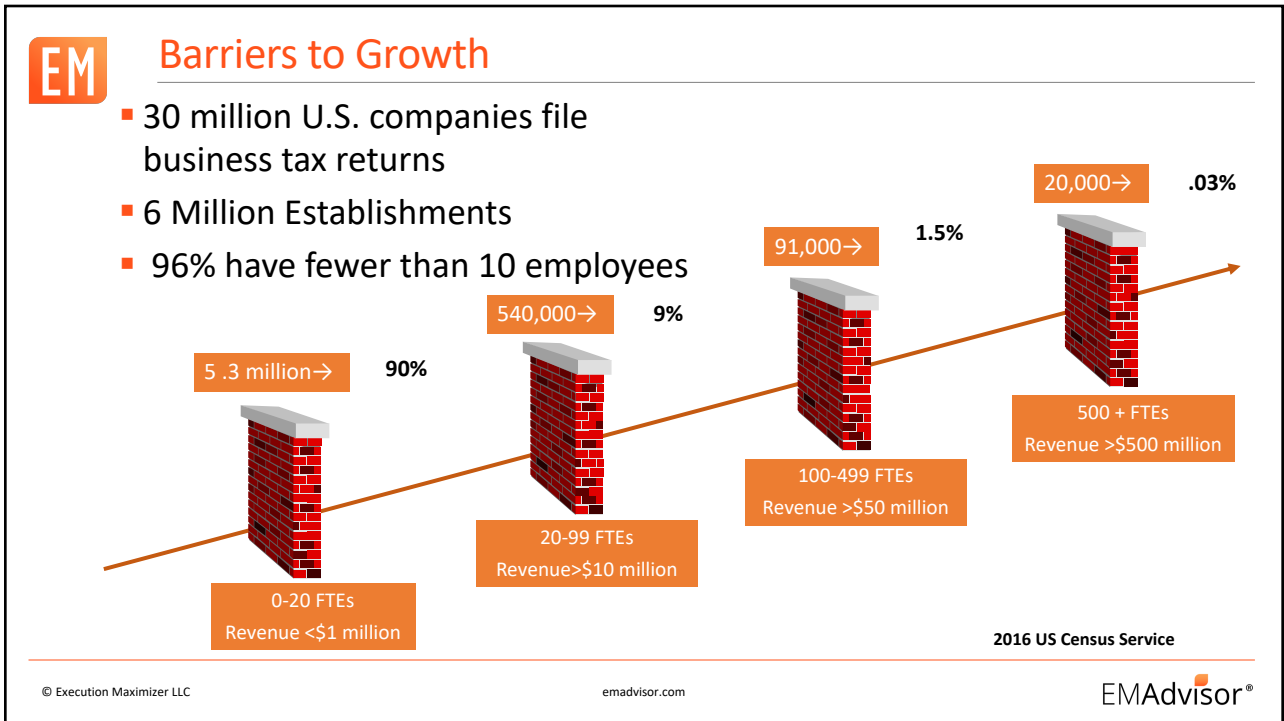


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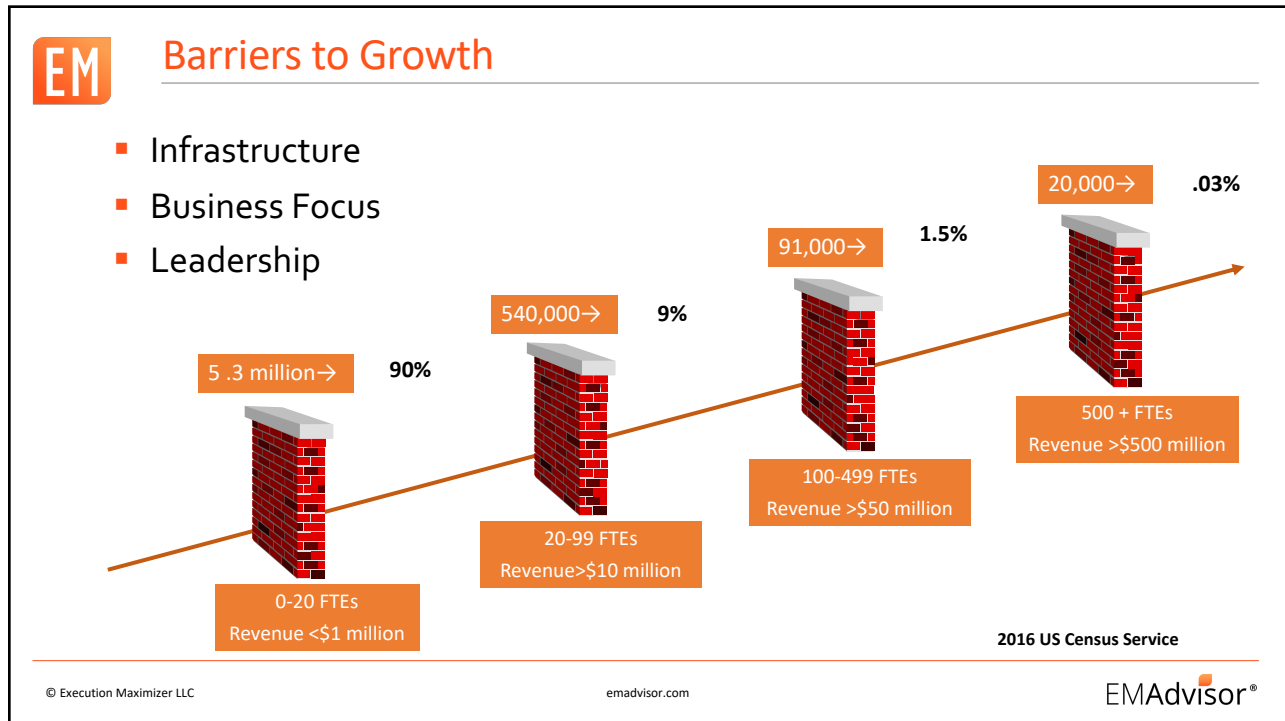


There are very predictable barriers to a company's profitable **growth**.

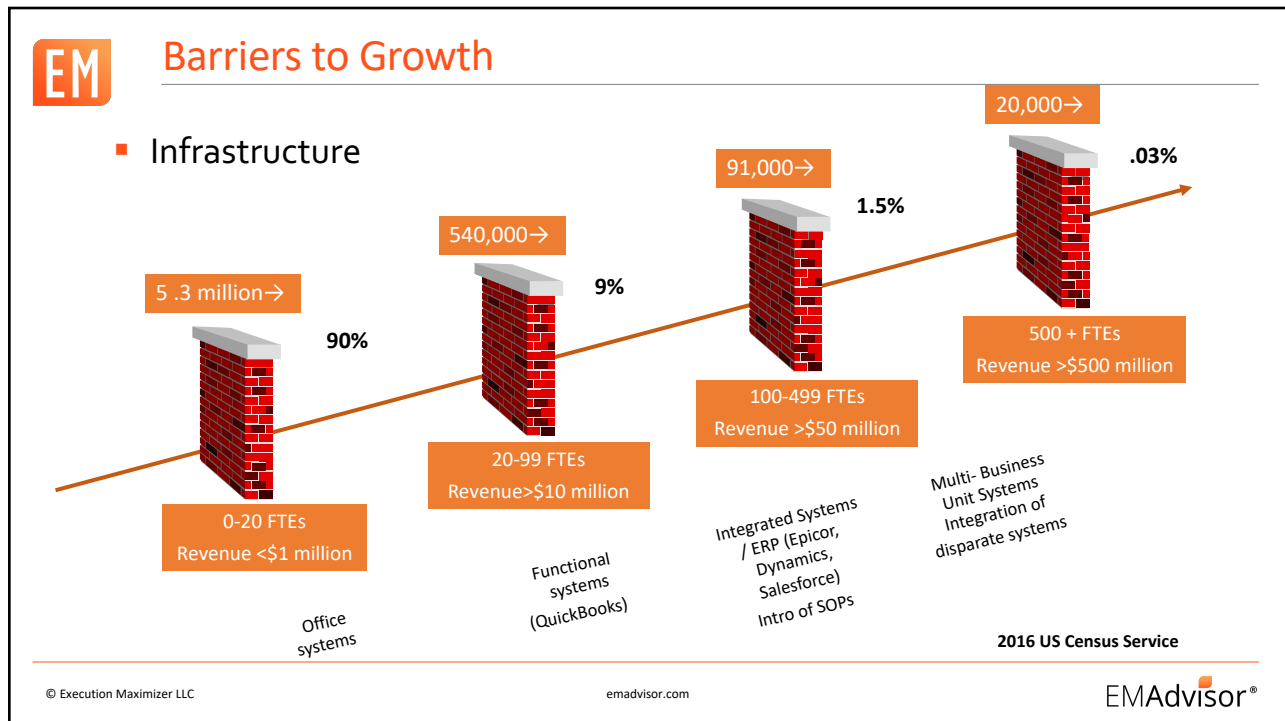
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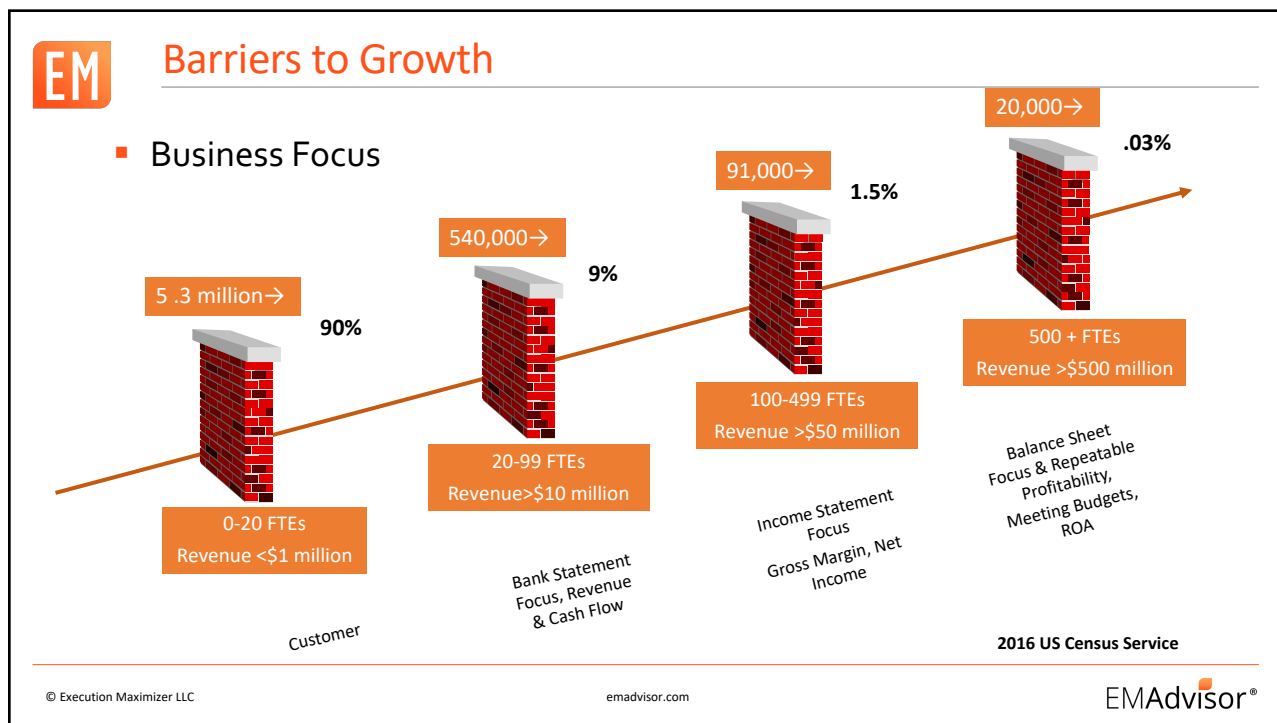
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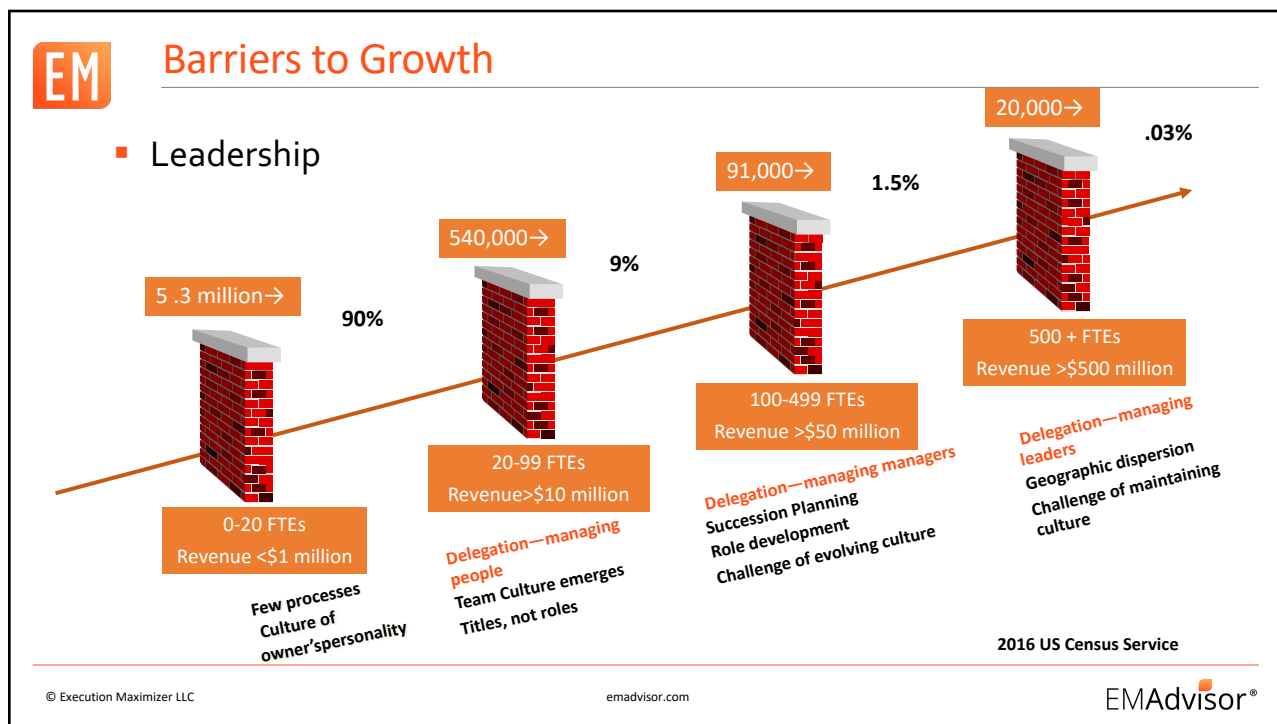
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**Delegation**

**DILBERT**

**BY SCOTT ADAMS**

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**Delegation**

- Pinpoint
- Feedback
- Risk Tolerance
- Recognition


*Great leaders delegate results, not tasks.*

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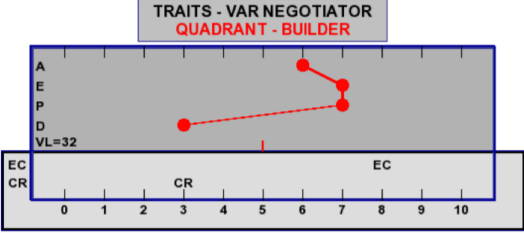
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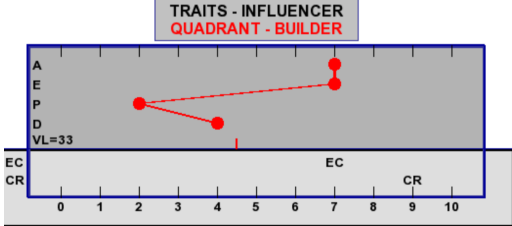
## Delegation & Personality Type

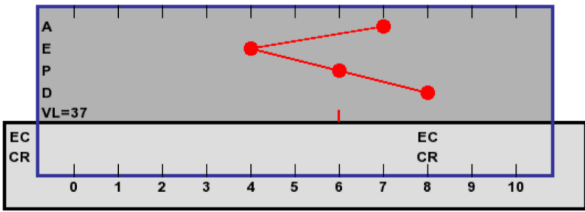
### Personality Impacts Delegation

**TRAITS - VAR NEGOTIATOR  
QUADRANT - BUILDER**



**TRAITS - INFLUENCER  
QUADRANT - BUILDER**






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### Eric Coryell Delegation Matrix

Decision Level	Eric Coryell Delegation & Decision Tree Matrix	
Level 1	Leader's Decision	
Level 2	Owner's Decision, but must be discussed with leader first. Ultimately owner's decision	
Level 3	Owner's Decision, but keep leader in the loop and with final outcome	
Level 4	Owner's Decision. Leader doesn't need/want to know anything about it.	

Entity & Decision Level	Owner	Decision Description
John (1) ELT (2)	Any ELT member	Change in GTM strategy
John (1) ELT (2)	Any ELT member	Change in people strategy (core values, purpose, bonus pool, etc)
John (2)	Bill	Change in health insurance or 401K provider
John (2)	ELT	Change in employment Req. Budget
Jill (1), Ryan (2), John 3	ELT	Change in CRM vendor or policies
John (3)	Kirk	Change Banks
Kirk (2) John (4)	Jill	Inventory purchases for stock > \$100,000

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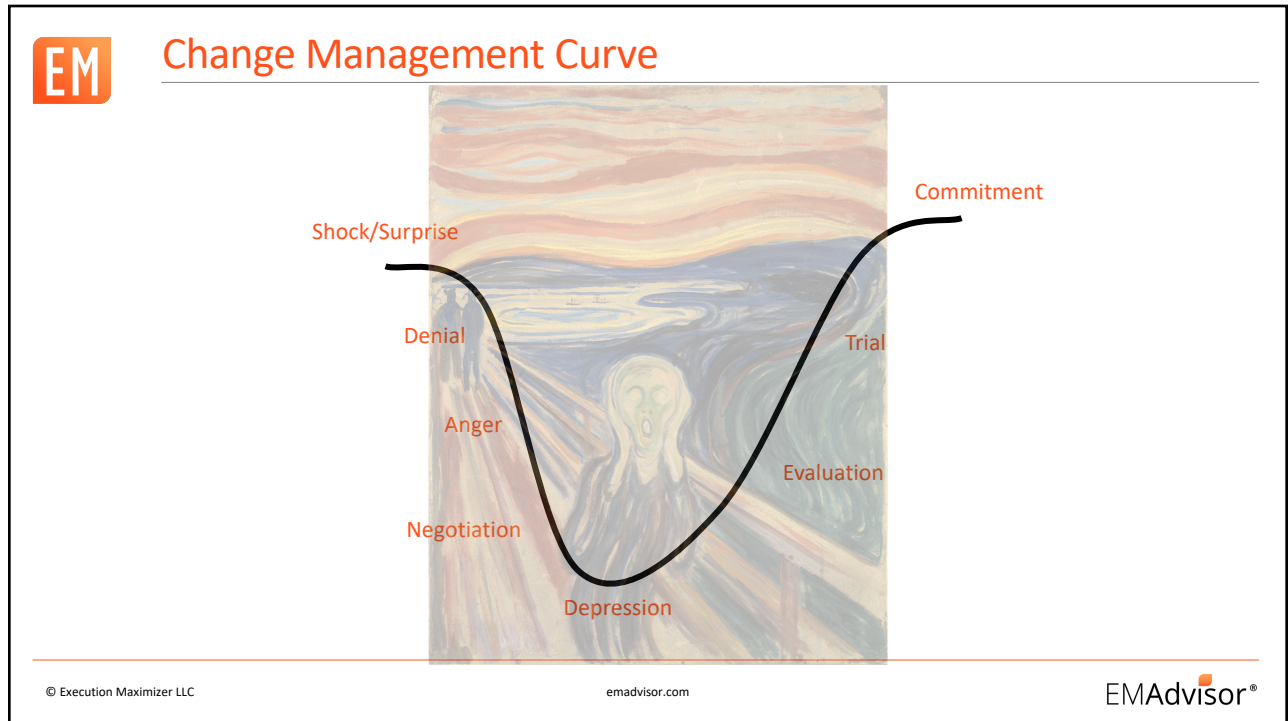
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# Break Time!

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What are the barriers to growth **in your company?**

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## Overcoming Barriers to Growth

The good news is that there are some simple, practical habits that will help you **overcome** these barriers.

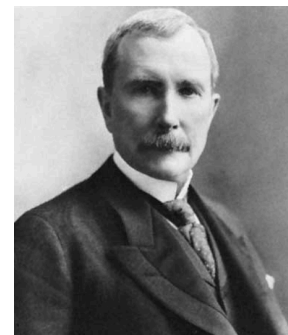
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## Strengthen Your Executive Team

- Priorities
  - Top 3-5
- Rhythm
  - Executive Team Meetings
- Data Driven
  - Metrics

### *Rockefeller Habits*



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## Strengthen Your Executive Team

### *Habit #1: Priorities*

- Priorities are the basis for accountability for your organization
- Priorities have to start at the company level and cascade down
- Top 3 to 5 focus areas (max) and know #1
- For 10 Years, 3 years, One year, and next quarter
- For company / department / individual levels

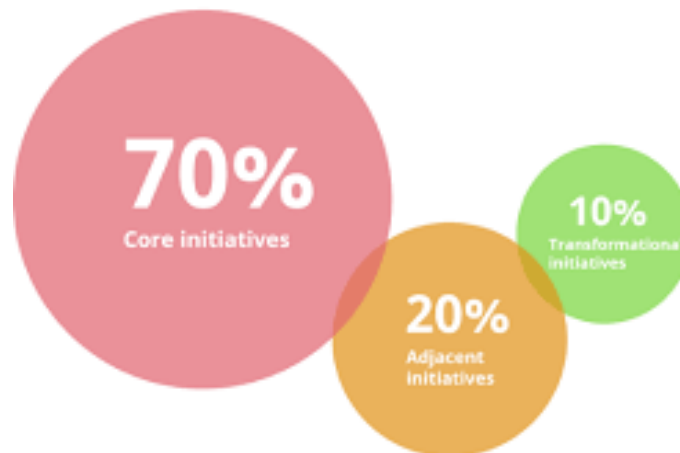
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Google

### Google's 70-20-10 Model

### Google Priority Model



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## Strengthen Your Executive Team

### Habit #1: Priorities

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## Strengthen Your Executive Team

### Habit #2: Meeting Rhythm

- Annual executive team off-site: 2 days
  - Day One Vision and Long-term Thinking
  - Day Two--3-Year, 1-Year, 90-plan
- Quarterly executive team meeting: 1 day
- Monthly executive team meeting: ½ day
- Weekly executive team meeting: 1 -1½ hours
- Daily huddle: 15 minutes maximum

This structured rhythm utilizes only  
5% of an executive team's total annual time!

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# Quarterly Meeting Offsite Agenda--Strategic

- Good news check-in
- Welcome kick off remarks--Leader
- Financial & KPI Walk Through
- Leadership Exercise
- Update on Rocks, On Track/Off Track
- IDS Issues for Quarter
- Other Issues
- Prioritize top 3 to 5 Q2 Rocks with accountabilities, metrics & dates
- Teamwork on strategic topics
- Commitments/cascading messages
- Wrap – one sentence close

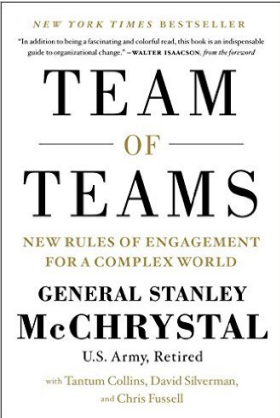
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## EM Tactical Weekly Meeting Agenda

- Same Day, Same Time, Start on time, End on time
- Good News Check-in, One Business, One Personal (5 minutes)
- Reporting (15 minutes) Scorecard on/off track, off-track moves to the issues list, Rock review, off-track moves to the issues list,
- Prioritize and Discuss Issues (60 minutes).
- To do's
- Cascading messages
- Meeting score and comments

Time	Agenda Item	Who	Notes	Score
5:00	Good News Check-in (5 minutes)	Everyone	Share good news, one personal item and one business item	
5:05	Reporting (15 minutes)	Everyone	Scorecard (On Track/Off Track); Q2 Track Moves to Issues List; Rock Review (On Track/Off Track); Q2 Track Moves to Issues List; Customer/Team Member Feedback (Good/Bad News); Add to Issues List	
5:10	Review Last Week's To Do's (15 minutes)	Everyone	Check in, Who Done	
5:15	Review Week's Priorities	Everyone		
5:20	Review Week's Priorities	Everyone		
5:25	Review Week's Priorities	Everyone		
5:30	Review Week's Priorities	Everyone		
5:35	Review Week's Priorities	Everyone		
5:40	Review Week's Priorities	Everyone		
5:45	Review Week's Priorities	Everyone		
5:50	Review Week's Priorities	Everyone		
5:55	Review Week's Priorities	Everyone		
6:00	Review Week's Priorities	Everyone		
6:05	Review Week's Priorities	Everyone		
6:10	Review Week's Priorities	Everyone		
6:15	Review Week's Priorities	Everyone		
6:20	Review Week's Priorities	Everyone		
6:25	Review Week's Priorities	Everyone		
6:30	Review Week's Priorities	Everyone		
6:35	Review Week's Priorities	Everyone		
6:40	Review Week's Priorities	Everyone		
6:45	Review Week's Priorities	Everyone		
6:50	Review Week's Priorities	Everyone		
6:55	Review Week's Priorities	Everyone		
7:00	Review Week's Priorities	Everyone		
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8:00	Review Week's Priorities	Everyone		
8:05	Review Week's Priorities	Everyone		
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8:15	Review Week's Priorities	Everyone		
8:20	Review Week's Priorities	Everyone		
8:25	Review Week's Priorities	Everyone		
8:30	Review Week's Priorities	Everyone		
8:35	Review Week's Priorities	Everyone		
8:40	Review Week's Priorities	Everyone		
8:45	Review Week's Priorities	Everyone		
8:50	Review Week's Priorities	Everyone		
8:55	Review Week's Priorities	Everyone		
9:00	Review Week's Priorities	Everyone		

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**EM**

NEW YORK TIMES BESTSELLER


"In addition to being a fascinating and colorful read, this book is an indispensable guide to organizational change." -WALTER ISAACSON, *from the foreword*

# TEAM OF TEAMS

NEW RULES OF ENGAGEMENT FOR A COMPLEX WORLD

**GENERAL STANLEY McCHRISTAL**  
U.S. Army, Retired

with Tatum Collins, David Silverman, and Chris Fussell



## Value of the Daily Huddle

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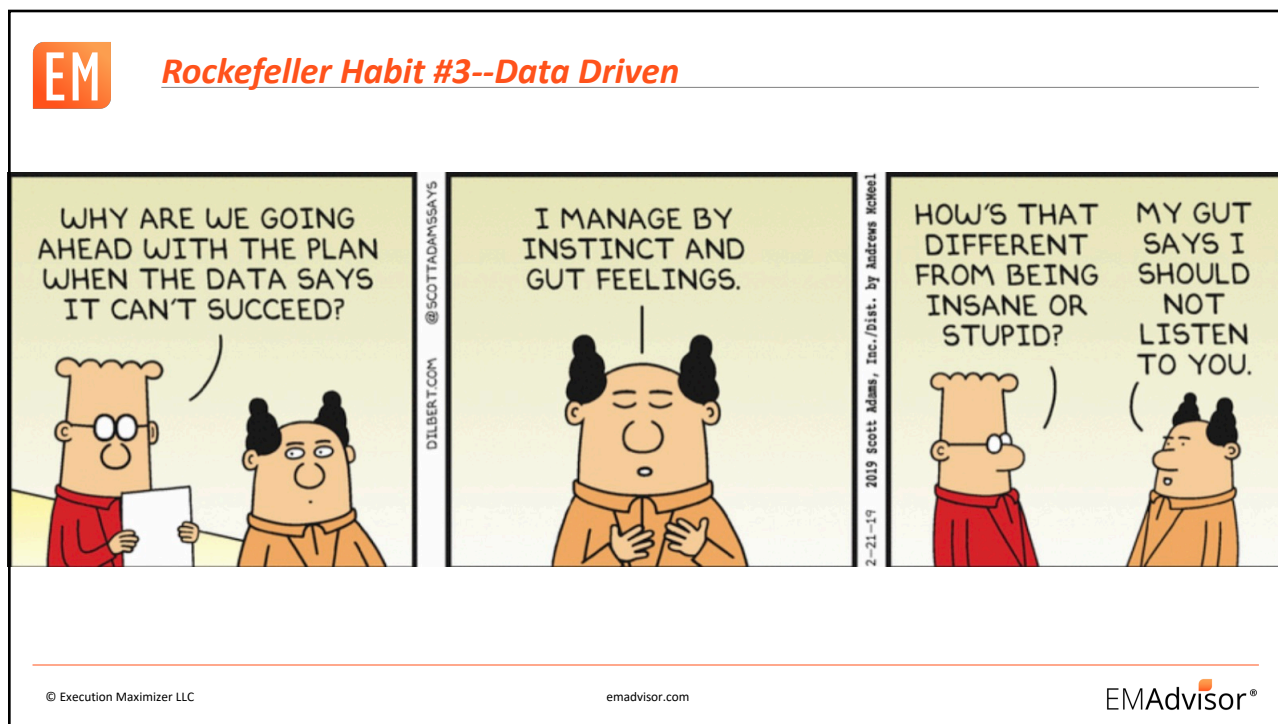
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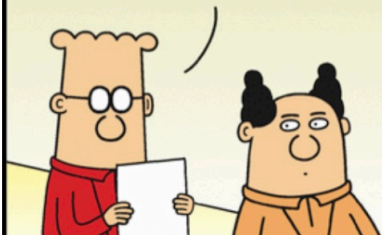


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**Rockefeller Habit #3--Data Driven**

WHY ARE WE GOING AHEAD WITH THE PLAN WHEN THE DATA SAYS IT CAN'T SUCCEED?



DILBERT.COM @SCOTTADAMSAYS

I MANAGE BY INSTINCT AND GUT FEELINGS.



2-21-19 2019 Scott Adams, Inc./Dist. by Andrews McMeel

HOW'S THAT DIFFERENT FROM BEING INSANE OR STUPID?



MY GUT SAYS I SHOULD NOT LISTEN TO YOU.



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## Strengthen Your Executive Team

*Habit #3: Data Driven*

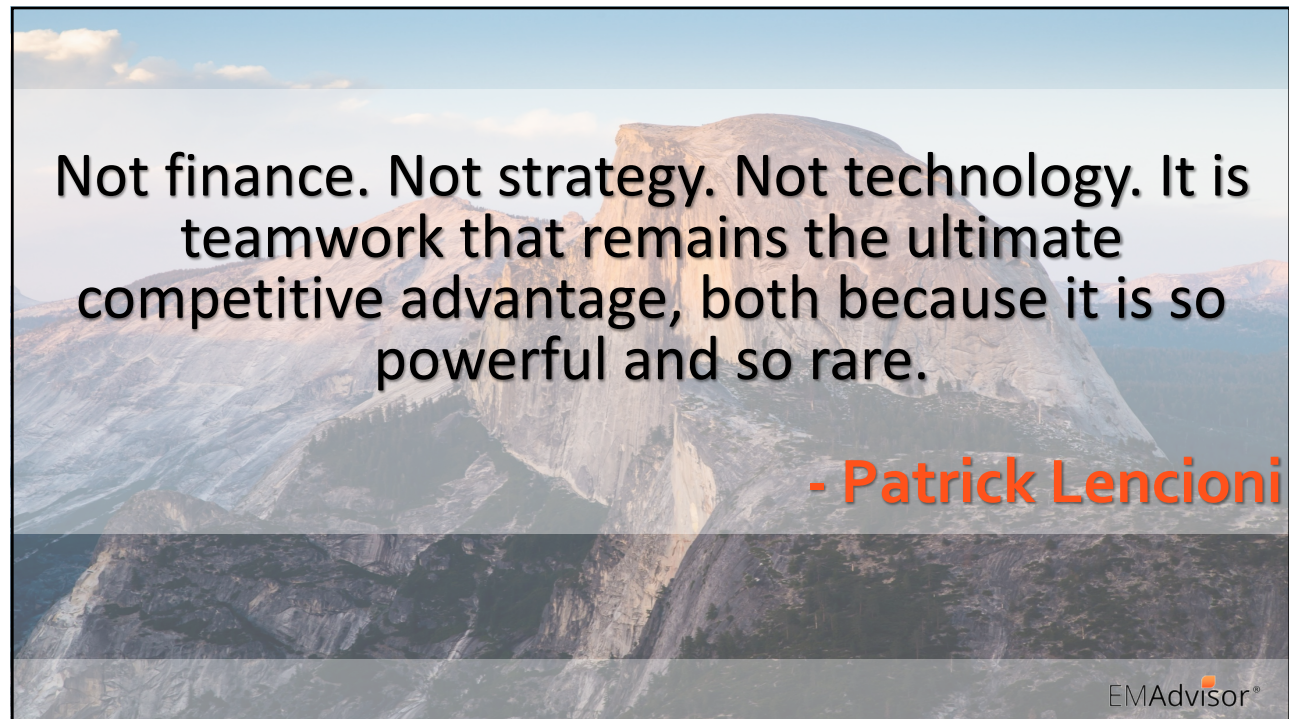
- Standard Corporate Numbers
  - Financial and operational numbers/ratios
  - Rear-view look and final when you see them
- Smart Numbers—KPI's
  - Typically 1 - 2 in any organization
    - 12 TTM Revenue, EBITDA
  - Leading indicators – what is around the corner?
    - Revenue per Employee
    - Price per X for commodities
- Critical Numbers
  - 1 or 2 numbers targeted to a critical business drivers
    - Top 10 Customers, 12 TTM this year to last year
    - NPD Revenue as % total revenue

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**EM** Leadership Team

*An organization needs to be both to be successful.*

**SMART**

- Strategy
- Marketing
- Sales
- Operations
- Finance
- Technology

**HEALTHY**

- Less Politics
- Less Confusion
- Higher Morale
- Higher Productivity
- Lower Turnover

\* Source: *The Four Obsessions of An Extraordinary Executive*, Patrick Lencioni, The Table Group, Inc.

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**EM** How Do You Run YOUR Business?

**PERFORMANCE DRIVEN**

COMMAND AND CONTROL

STRESSED OUT/BURNED OUT

LEADS TO TURNOVER & RESENTMENT

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**EM** How Do You Run YOUR Business?

**FOCUS ON DIGNITY**

CODDLED WITH LITTLE ACCOUNTABILITY

MEDIOCRITY ACCEPTED

LEADS TO TURNOVER OF "A" PLAYERS

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**EM** How Do You Run YOUR Business?

**PERFORMANCE + DIGNITY**

HIGH PERFORMANCE—"A PLAYERS" MOTIVATED

HIGHER RETENTION OF THE BEST PEOPLE

REPEATABLE AND PREDICTABLE PROFITABILITY

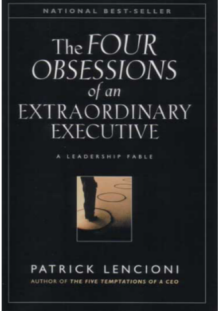
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**EM** Leadership Team

*The Four Obsessions*



1. Build and maintain a cohesive leadership team

2. Create organizational clarity

3. Over-communicate organizational clarity

4. Reinforce clarity through human systems

\* Source: *The Four Obsessions of An Extraordinary Executive*, Patrick Lencioni, The Table Group, Inc.

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Building a visionary company requires **1%** vision and **99%** alignment



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## Creating Your A Team



*"Don't create followers,  
create more leaders"*

*- Tom Peters*

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## Creating Your A Team

- Define the role
- Assess, assess, and assess
  - Personality assessments
  - Industrial Psychologists
  - Interviews
- Spend time with your "A" team
  - Meeting Rhythm
  - 121 Meetings
  - Social
- Agree on definition of accountability
  - Metrics

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# Metiss Group™ Job accountability

ABC Company – VP, Sales Accountabilities			
Accountability	Priority	Percent Time	Success Factors
<b>Talent Management</b> <ul style="list-style-type: none"> <li>Coach/Develop/Mentor</li> <li>Build team and bench</li> <li>Conduct regular one-on-ones</li> <li>Development and succession plans for direct reports</li> <li>Conduct quarterly performance reviews</li> <li>Ride-alongs with direct reports</li> <li>Personal development</li> </ul>	1	30%	<ul style="list-style-type: none"> <li>Demonstrated positive team interactions</li> <li>Team member goals met</li> <li>Team members demonstrate core values</li> <li>Zero avoidable turnover of "A" players</li> <li>Demonstrated team member growth</li> <li>Quarterly reviews conducted and documented timely</li> <li>Successful new hires; become "A" players</li> <li>Personal development plan achieved</li> </ul>
<b>Sales Management</b> <ul style="list-style-type: none"> <li>Develop and implement (teach) sales process</li> <li>Problem solve sales issues</li> <li>Create and develop sales channels</li> <li>Strategic sales planning</li> <li>Support sales team (remove obstacles, provide resources)</li> <li>Develop prospect plans and strategies</li> </ul>	2	25%	<ul style="list-style-type: none"> <li>Develop sales strategy plan</li> <li>Increase consulting to 401k sales ratio</li> <li>Achieve sales goals</li> <li>Incentive plans aligned with strategic sales plan</li> </ul>
<b>Marketing Management</b> <ul style="list-style-type: none"> <li>Manage messages, strategies</li> <li>COI management</li> <li>Nurture leads, getting leads sales ready</li> <li>Identify new partners</li> <li>Support marketing team (remove obstacles, provide resources)</li> </ul>	3	20%	<ul style="list-style-type: none"> <li>Develop marketing plans</li> <li>Lead targets achieved</li> <li>COI lead targets achieved</li> <li>Demonstrated client and internal message awareness</li> </ul>
<b>Customer Retention Management</b> <ul style="list-style-type: none"> <li>Support CRM team (remove obstacles, provide resources)</li> <li>Select client ownership</li> <li>Develop retention plans and strategies</li> <li>Oversee processes</li> <li>Vendor/Partner Program management</li> </ul>	4	15%	<ul style="list-style-type: none"> <li>Increased clients' view of FOF as "partners"</li> <li>Client retention plans in place</li> <li>Measured success in Partner Program</li> </ul>
<b>Executive and General Administrative Activities</b> <ul style="list-style-type: none"> <li>Budgeting</li> <li>Business strategic planning</li> <li>Work with peers and departments</li> <li>Coordinate group activity</li> <li>Executive/management team member</li> <li>Executive team rock ownership</li> <li>Work with CRM system (Net Suite)</li> <li>Coordinate activity and KPI reports</li> </ul>	5	10%	<ul style="list-style-type: none"> <li>Positive team member feedback</li> <li>Positive management feedback</li> <li>Expenses within budget</li> <li>Reports meaningful, timely, and accurate</li> </ul>


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## Creating Your A Team

- Define the role
- Assess, assess, and assess
  - Personality assessments
  - Industrial Psychologists
  - Interviews
- Spend time with your "A" team
  - Meeting Rhythm
  - 121 Meetings
  - Social
- Agree on definition of accountability
  - Metrics

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## Achieving Your Vision

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The Execution Roadmap™

Company:

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CORE IDEOLOGY  
CORE VALUES

Resource:  
Jim Collins    Patrick Lencioni  
Verne Harnish    Brad Smart  
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LONG-TERM STRATEGIC THINKING

STRATEGIC ANCHORS

HEDGEHOG  
Passionate About

Can Be the Best in the World

Economic Engine (Profit per X)

BHAG 10-30 Years Out

SANDBOX  
Geographic Area We Serve

Target Customer Segments

Products and Services We Provide

VALUE PROPOSITION

BRAND PROMISE

SWOT/DOS REVIEW

Strengths (Internal)

Weaknesses (Internal)


Opportunities (External)

Threats (External)


“It all starts with a vision (core ideology) combined with a specific plan and a process to execute that vision fail for lack of vision.” –Jim Collins

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## Elements of Vision for the Organization

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- The Key Elements of the Vision Component of Strategic Plans
  - Core Values--**Observational**
  - Purpose--**Aspirational**
  - Mission—**Back of the Business Card**
  - Strategic Anchors—**Our Execution “Special Sauce”**
  - Hedgehog—**Our Key to Success**
  - BHAG—**10 Year Target**
  - Value Proposition—**Who do we Serve?**
  - Brand Promise—**For What will we be Remembered?**

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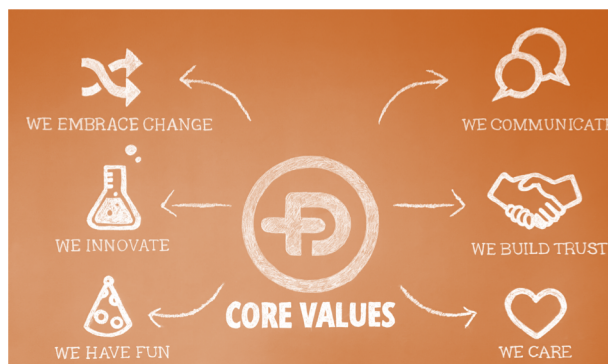


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## Core Values—Observed Behavior

- Guidelines to behavior
- Decision-making framework
- Hiring
- Annual performance appraisal



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CHARTER DURA-BAR

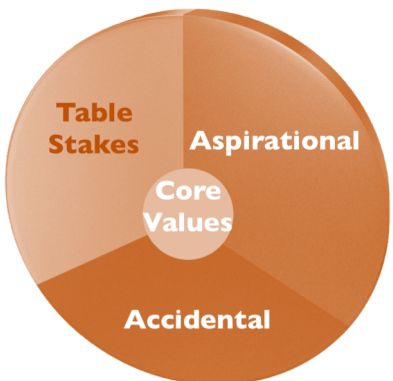

OUR WILL TO GROW  
DRIVES US TO DO IT BETTER

**VALUES**

<p><b>Trust</b></p> <p>We earn trust by having integrity, being accountable, communicating openly and developing our relationships and capabilities.</p>	<p><b>Teamwork</b></p> <p>We work best when we are collaborating with each other.</p>
<p><b>Safety</b></p> <p>We want everyone to finish their work, in the same condition they started.</p>	<p><b>Continuous Improvement</b></p> <p>We strive to get better every day.</p>

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**EM** Core Values—Observed Behaviors



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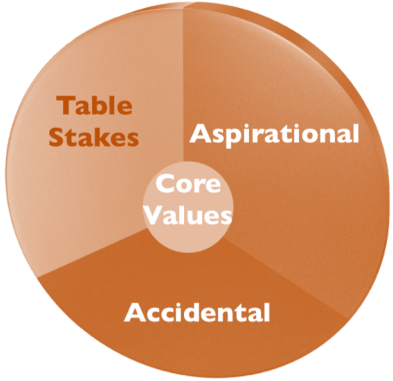
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**EM** Core Values




**THE FOUR-WAY TEST**  
OF THE THINGS WE THINK, SAY OR DO

1. IS IT THE TRUTH?
2. IS IT FAIR TO ALL CONCERN?
3. WILL IT BUILD GOOD WILL AND BETTER FRIENDSHIPS?
4. WILL IT BE BENEFICIAL TO ALL CONCERN?



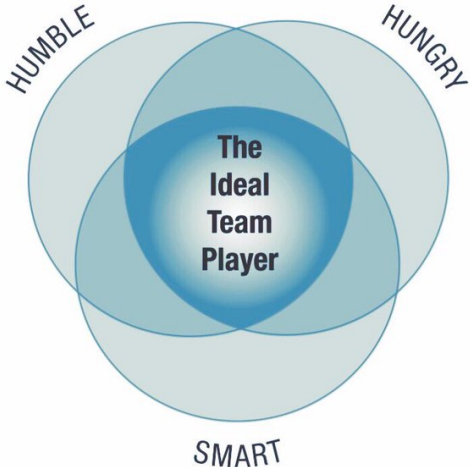
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## Core Values


### The Table Group





HOW TO SPOT  
IDEAL TEAM PLAYERS

By Patrick Lencioni



**W**ith enough time, patience and attention from a good manager, almost anyone can learn to become a team player. I believe that.

Having said that, some people are better at teamwork than others. These are the kind of people who add immediate value in a team environment and require much less coaching and management to contribute in a meaningful way.


So, there are two obvious questions. What do these people look like? And how do we find them? As it turns out, they have three qualities or virtues in common: they are humble, hungry and smart.

Before I explain each of those virtues, let me explain how this theory came about. Like so many of my ideas, this one surfaced as a result of my work with clients over the past twenty years. Whenever I worked with CEOs and their leadership teams to identify core values, I often was asked about the values of my own firm, The Table Group. When we revealed our three values, many of our clients would ask us if they could adopt those values for themselves.

Of course, we would say 'no,' explaining that they needed to come up with concepts that reflected their unique history and culture. We were a company oriented around teamwork and known for *The Five Dysfunctions of a Team*, so the values of humble, hungry and smart made sense for us. What we failed to realize was that our clients, almost all of whom were committed to the idea of teamwork, were drawn to our values because those were the building blocks of real team players. Once we realized this, the idea for this book was born.


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## Core Values

### NETFLIX




### NINE CORE VALUES

<b>JUDGEMENT</b>	<b>COMMUNICATION</b>	<b>IMPACT</b>
<b>CURIOSITY</b>	<b>INNOVATION</b>	<b>COURAGE</b>
<b>PASSION</b>	<b>HONESTY</b>	<b>SELFLESSNESS</b>


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## Operationalize your Core Values

Company Core Values Guide




  

Core Value	Supporting Phrases	What Does It Mean?	What Does It NOT Mean?	How It Shows Up	Why It Is Core
All In!	Show Up every day ready to do your best. Always strive to make yourself and others better. Good enough, isn't enough.	You are motivated and truly want to do great work and be an ambassador for the company. Delivering for clients (both internal and external) is priority.	Talking a lot. Actions matter more than words. Complacency.	You get excited about a project, you get lost in the moment/flow, you tell people outside of the company how much you like being a part of the team. You strive to learn more and excel in your career.	Our business process, budgets, and brand all rely on talented driven people to execute at a high level. People want to work with people who are passionate about what they do.


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## Operationalizing Core Values

Core Value	Supporting Phrases	What does it mean?	What does it NOT mean?	How it shows up?	Why is it Core?	What Stories describe the core value
<b>Help First</b>	Rolling up your sleeves. Teamwork. Solve problems.	Go beyond your own job. Customers first.	Enabling bad behavior. Doing somebody's job for them.	Pick up litter off floor. Observant. Stepping "back". Willingness to pitch in.	Portrays Teamwork. Caring for others success.	
<b>Do the Right Thing</b>	Work safely. Keeping yourself and the company safe. Integrity. Doing right things right.	Living our core values.	Shortcuts. Unethical practices. Violating safety. Poor quality.	Less re-work, less loss time accidents, Risk management, speaking up, No retribution for speaking up. Builds trust with customers and employees. Growth.	Makes company better, hold ourselves accountable. Doing what is in company interest.	
<b>Do What you Say</b>	Accountability. Follow-thru. Dependable.	Commitment, Consistency	Lying, dishonesty, missing deadlines. Being over-extended. Backing off of commitments. Letting team down. inflexibility	Strong work ethic. Attendance. Deliverables. Results. Strong team member.	Makes the company stronger, creates better teams	
<b>Humble Confidence</b>	No task is too small. Acknowledging strengths/weaknesses. Confident in our ability to achieve.	More about "we" than "me".	Conceit. Bragging. Meekness. Rejecting other's ideas. Disparaging competitors.	Hanging out on shop floor. Volunteering yourself. Admitting when you are wrong. Advocating for our company. Being a servant leader. Giving credit to team, rather than taking all the credit	Servant Leadership is the core of our culture	
<b>Growth</b>	Personal & professional, continuous improvement. Willingness to change, adaptability. Pushing thru barriers. Tenacity. Taking calculated Risks. Passion to keep going. Drive. Forward looking. Self motivated. .	Culture of Learning	Resisting Change. Pessimism. Lack of stability. Growth for growth's sake. Being a victim.	Hungry, ambition, hard-work. Dedication. Shares new ideas. Continuous learning. Growth mindset. Happiness. Self-assessment/reflection. Strategic Planning.	Grow or Die!	

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**EM** Purpose—Highly Aspirational, Inspiring

*MTP (Massive Transformative Purpose)*

- People need to serve a higher order
- Typically lasts the life of the leader/founder(s)
- Internal use, not a marketing slogan

**MASSIVE**

Audaciously big and aspirational.

**TRANSFORMATIVE**

Can cause significant transformation to an industry, community, or to the planet.

**PURPOSE**


There's a clear "why" behind the work being done. Something that unites and inspires action.

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**EM** Massive Transformative Purpose--Aspirational




Accelerate the transition to sustainable transportation



Ideas worth spreading



Organise the worlds information



Radical breakthroughs for the benefit of humanity

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## Vision-Level BHAG

- It's clear and compelling
  - ✓ At least 10 years out
  - ✓ Requires thinking beyond current capabilities
- Beyond current trends, forces and conditions
- Gulp factor; audacious but not braggadocios
- Must reinforce core values, purpose and business fundamentals
- Center of Hedgehog



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## Alan Mulally

*Former President  
& CEO*

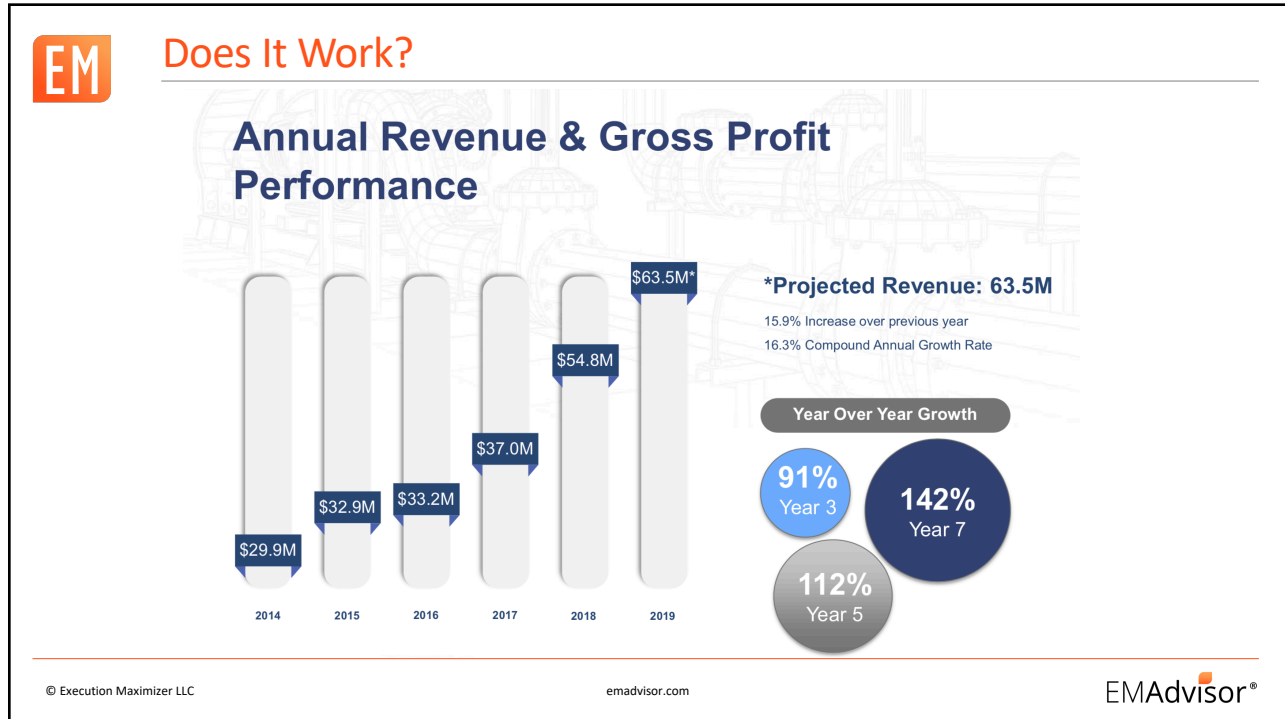
Ford Motor Company



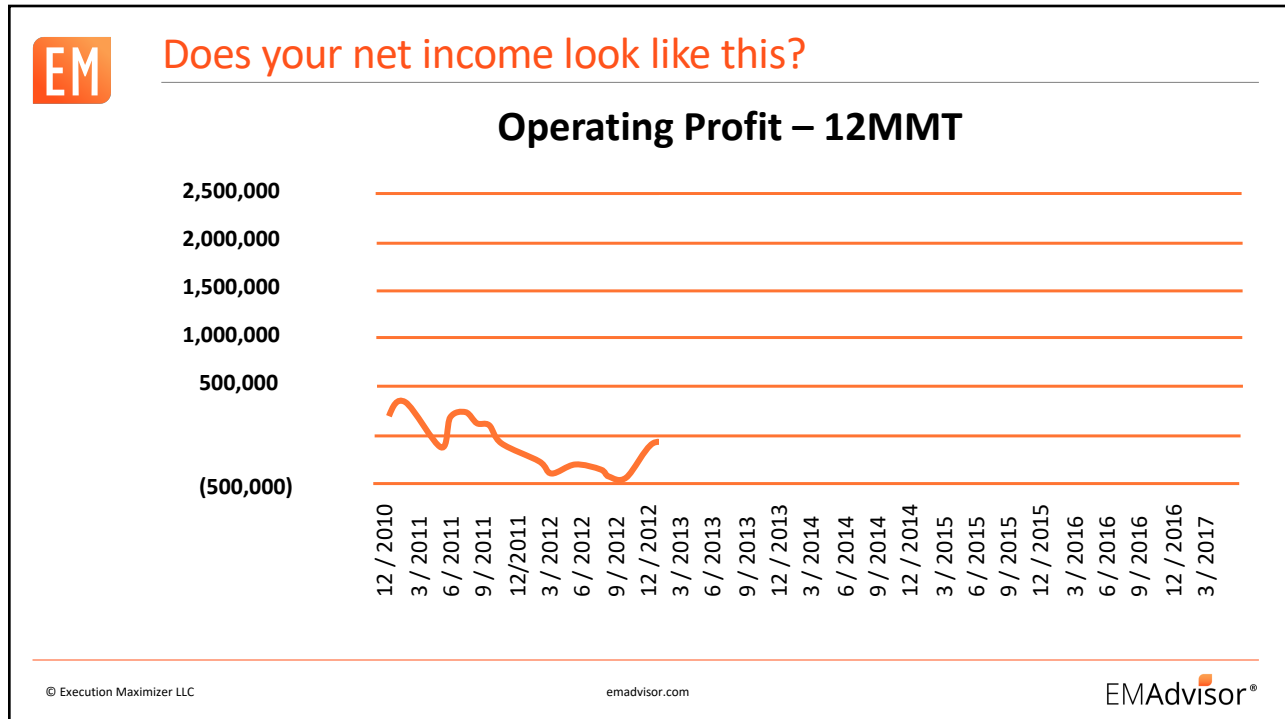
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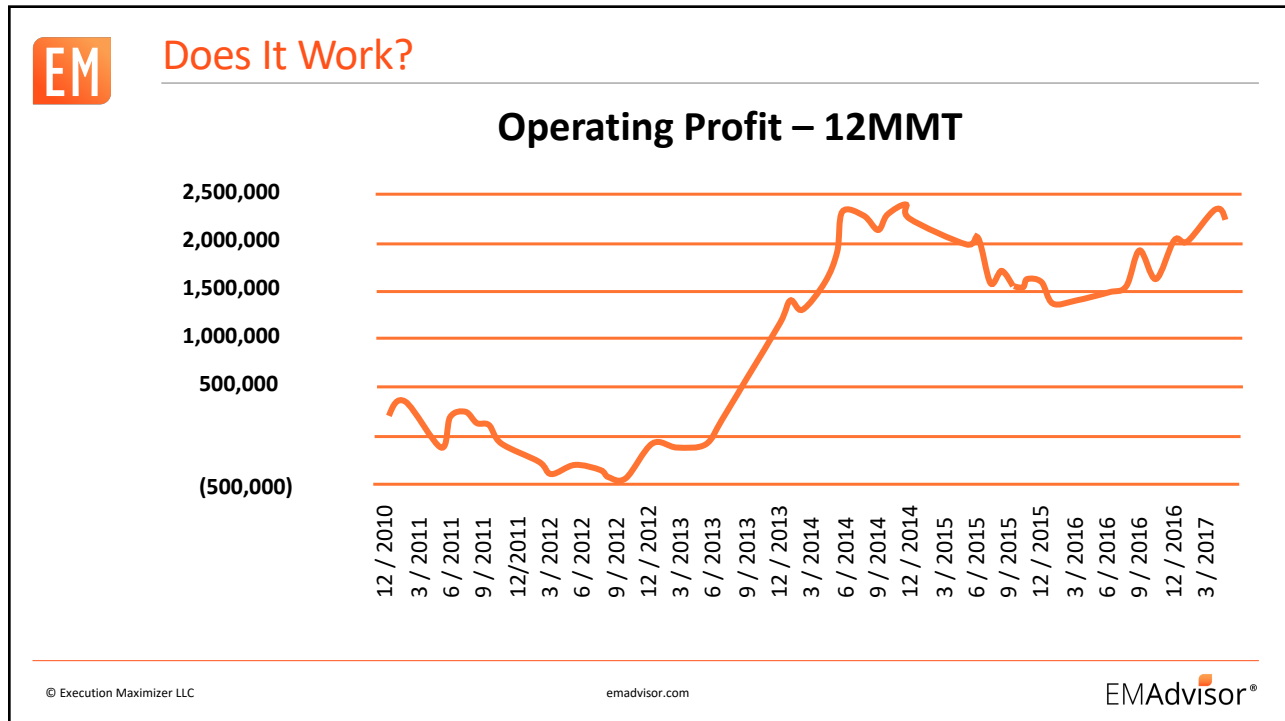




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**EM** Execution Tune-up Wrap

- What’s your 1 Thing?
- What worked?
- What would you improve?
- Value of your time 1-10?

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**EM** Meeting Wrap Tool

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**What is your meeting rating today? 0-10**

Were your expectations met?

What worked?

What would you improve?

<b>One person I want to acknowledge (not in this room and not in my reporting area) is:</b>	<b>Who I would like to follow up:</b>
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**EM**

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# Thank You

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