



PLANNING & EXECUTION CASE STUDY

MEDIUM SIZED SOFTWARE COMPANY

Business planning

SITUATION:

Get everyone on the same page about what are the objectives and then communicate to everyone in the company. From this, make the management team more coherent and able to focus on actions that progress the business – not just busily working in the weeds.



REQUIREMENTS

Build a set of points that describe the organization's goals to signal what needs to be done in the short, medium and long term. In addition to the factual targets, describe the organization's "personality" so that everyone has a common vision for the future and also a shared understanding of the deeper, more motivating "why" questions that resonate at an emotional level. These all need to be set out so they're both memorable and authentic. We wanted to build and communicate:

- Core values (who are we)
- Core purpose (what do our customers get, in their business terms)
- Brand Promise (what do we deliver every time that sets us apart)
- Who are our clients, where are they and how do we connect with them
- 20 years aspirations
- 3-5 year most important actions
- One year goals
- Quarterly objectives

CHALLENGES

Management was not used to the degree of effort and collaboration required in order to agree on what seemed to be straightforward bullet points. The team had to work through their own learning on working as a team to push through some degree of give and take to get a high quality product. It was challenging for managers to pull out of their day to day whirlwind and just get things down in plain language.



ACTIONS:

We ran a two day start up workshop and then held quarterly one day review sessions to work through the deliverables one by one. We held short monthly reviews and ad hoc sessions in between the meetings to work through road blocks or to develop effective techniques.

As they were developed, each of the values, goals and action points were used by the managers in meetings, informal contacts, emails or wherever they fit to communicate and reinforce “the plan”.

RESULTS

We delivered all the statements of goals, values and actions which made employee (and customer) communication much clearer and coordinated. Managers had a tool that could help them frame ideas and concepts that in the past had been hard to understand and inconsistent. The organization’s performance improved sharply in terms of employee and customer satisfaction and also shareholder satisfaction. The management team itself became much more effective as they learned to work with each other at a much deeper level.