Truth. It pays to pay attention.

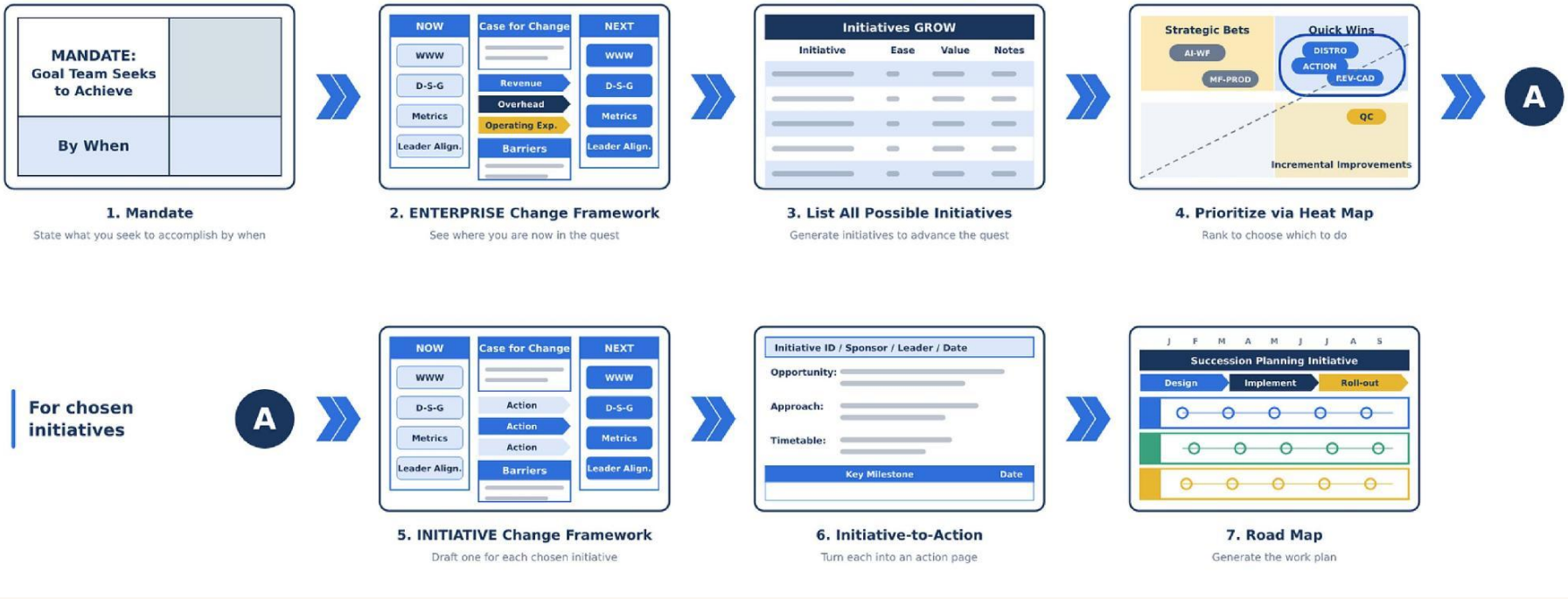
Action.

Do & Review

Make a plan.
Take action.
Review what happens.



Initiatives transition from NOW to NEXT.



What can go wrong?

Offsite initiatives

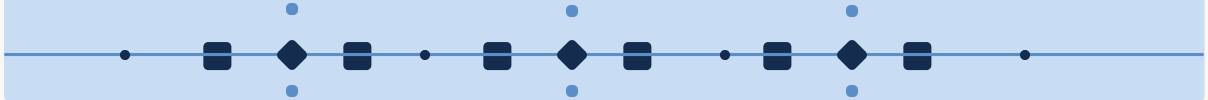
- Initiative A
- Initiative B
- Initiative C

⋮

- Initiative n

IDEALIZED

Own → Launch → Execute, learn, and adapt → Benefits realized



COMMON REALITY

Return to business as usual → Flatline → Same meeting next year

What makes the paths diverge?

Every stage of change has pitfalls and tools to help

Lewin* **the stages of change**	**Unfreeze**	**Change**	**Refreeze**
Kotter** **what can go wrong**	• No sense of urgency • No guiding coalition • No clear vision	• Vision not communicated • People not empowered to act • No short-term wins	• Gains not consolidated and extended • Change not institutionalized
Manage to Lead*** **tools to help things go right**	• Mandate • Enterprise CF • WHAT-WHO-WHY • Leadership alignment • Do-Sell-Grow • What to watch	• Initiatives • Heat Map • Initiative CF • Initiative-to-Action • Owners • Work plans	• Do & Review • Get Help • Grow

Based on:
* Lewin, Kurt. Frontiers in Group Dynamics, 1947.
** Kotter, John. Leading Change, 1996. Kotter's eight conditions are a paraphrase.
*** Manage to Lead: Seven Truths to Help You Change the World, 2013.

It pays to pay attention

Governance: direction, guidance, clarification, push up, decisions, barrier removal, advice



Metrics: measures to know when done and to see what is happening vis a vis plan

Communication: stakeholders informed and aligned as conditions evolve

"Active and visible sponsorship has been the top contributor to change success reported by participants in Prosci's benchmarking research since 1998."

Prosci, Best Practices in Change Management, 12th ed.

● Executive Review

Effective reviews start before, and end after, the meeting



WHO ATTENDS

- Sponsor calls review
- Manager runs review
- Team
- Outside insiders
- Outside experts
- Facilitator

STANDING QUESTIONS

- What was to be done?
- What has been done?
- What happened?
- What was learned?
- What's next?

BENEFITS

Sessions allow leaders to

- Keep things on track
- Connect to front-line
- Cross-fertilize
- Apply judgment
- Give guidance
- Manage
- Showcase talent
- Increase stakes
- Inform methods
- Teach
- Learn

WHAT TO REVIEW

Systematically govern anything important

Especially risky, high-stakes or new initiatives, operations, sales, accounts, policies, projects and one-on-ones.

Good governance requires a support system

Direction, Guidance, Support, Accountability

Governance lead

Drive, schedule, track, support, train

Sponsor and reviewers

Prepare, clarify, push up, advise

Ground rules	**Preparation instructions**	**Review calendar**	**Templates, artifacts and exemplars**
Best practices and training resources	**Meeting records**	**Decision and action tracking**	**Communications and reports**

NOW

Initiative A Organization, Function, Unit, or Initiative Leadership

Initiative B Organization, Function, Unit, or Initiative Leadership

Initiative n Organization, Function, Unit, or Initiative Leadership

NEXT

Eight reasons executive reviews underperform

1 Absent or disengaged reviewers	2 Piling on	3 Transferable learning not shared	4 Reviewers see only what they hoped to see
5 Unsafe forum leads to a dog-and-pony show	6 Presentation crowds out inquiry	7 Too much story-telling and self-promotion	8 Unprepared participants

Prepare. show uP. Pay attention. develop a Point of view. Participate.