

November 18–20, 2010
Arlington, VA



SHRM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

**Strategic Planning for Maximizing Performance
Presented By
Art Jackson, ENPM, Inc.**

SHRM Leadership Conference

**Strategic
Planning
for
Maximizing
Performance**



**Presented By
Art Jackson
Eagles Nest Performance Mgmt., Inc.**

“We’re fixin’ to have

A good time!”



**We're Here
To Talk
About
Greatness!**



A Most Important Sale!



The Sale

- You and your organization have an intended level of greatness and that's more than just being successful
- Greatness does not happen by accident ...
It happens by strategic planning
and effective implementation



The Challenge to Greatness

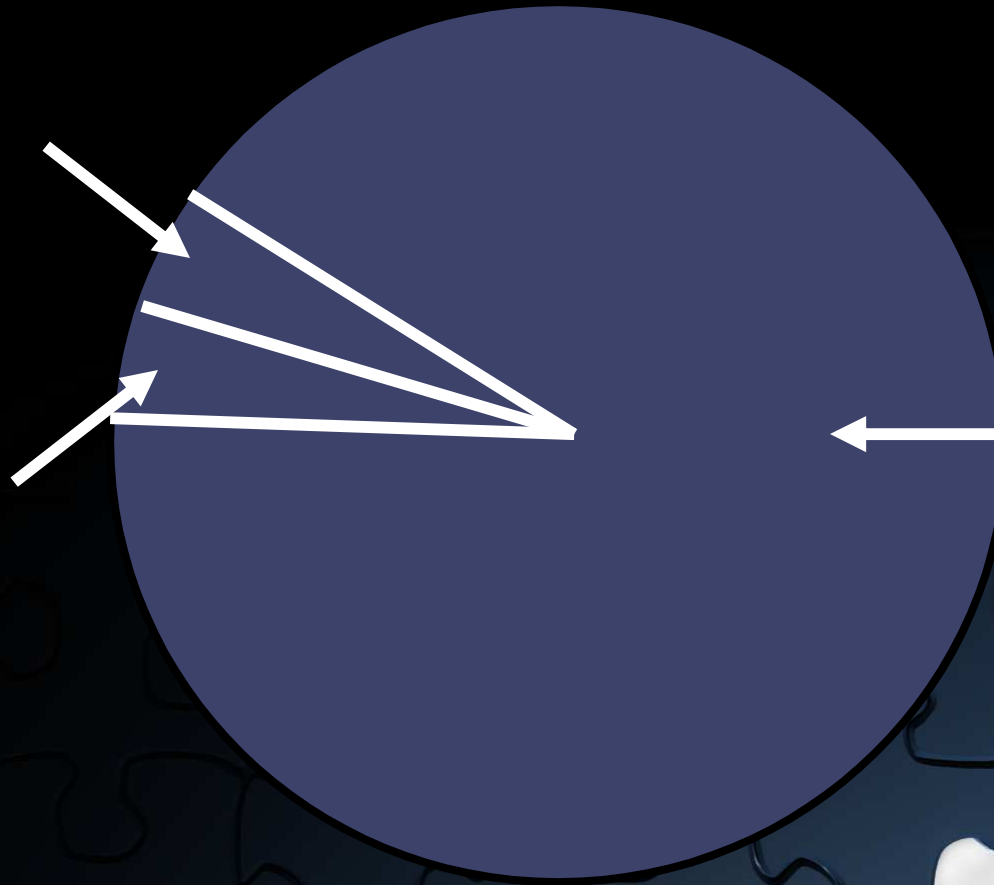


“I Can!”

10% Can't
And Don't

10% Can
And Do

80% Can ...
Just Don't



Out of every 3 ... There's only 1!

What We're Going To Cover Today

- The Power and Benefits of Strategic Planning
- Enterprise Performance Management
- The Problems
- The Leader Who Got It Right
- Key Processes
- The PCL™-EPM System



2 Questions & An Action

- **Question #1** Where are you now?
- **Question #2** Where do you want to go?
- **Action** Strategic Planning integrated
with Enterprise Performance
Management



Maximizing Performance Means Manifesting Greatness

The Definition of Greatness

Levels of Performance

- Greatness
- Successful
- Average
- Failure



Maximizing Performance Means ...

Getting their “A Game” every day

Rewarding “A Game” performance

Confronting “B Game” performance

Transferring emotion



Sun Tzu's *The Art of War*

“To succeed in war, one should have full knowledge of one's own strengths and weaknesses and full knowledge of one's enemy's strengths and weaknesses.

Lack of either one might result in defeat.”



Strategic Planning Is ...

The formal process of defining an organization's direction, and how it will allocate resources to pursue that direction.



Strategic Planning Benefits

- Creates focus
- Generates buy-in
- Builds teams
- Maximizes performance



Strategic Planning Answers The Key Questions

- "What do we do?"
- "Who do we do it for?"
- "How do we beat the competition doing it?"

**But Are We Missing
A Critical Question?**



Enterprise Performance Management Is ...

The formal process of organizing, automating and optimizing business methodologies to measure and drive performance.



EPM Benefits

- Identifies synergies and dependencies
- Reduces duplication of efforts
- Maximizes performance



EPM Answers The Key Questions

- How well are we doing what we do?
- How can we do it better?

**But Are We Missing
A Critical Question?**



The Problems

1940's to 1980's Increase The Thinking!

- Heavy emphasis on strategic planning finding the path that would ensure success
- Setting the organization's course and pushing to the end.



The Problems

1980's to Today Increase The Doing!

- Heavy emphasis on performance management
- Creation of systems that would automate the effort as much as possible to get more done.



The Real Problem

- We created a thinking process (strategic planning) that didn't speak to our doing process (enterprise performance management)
- And ...
- We didn't address
'A Critical Question'



A Critical Question?

How do we become the kind of people that can do ...

What was thought up!

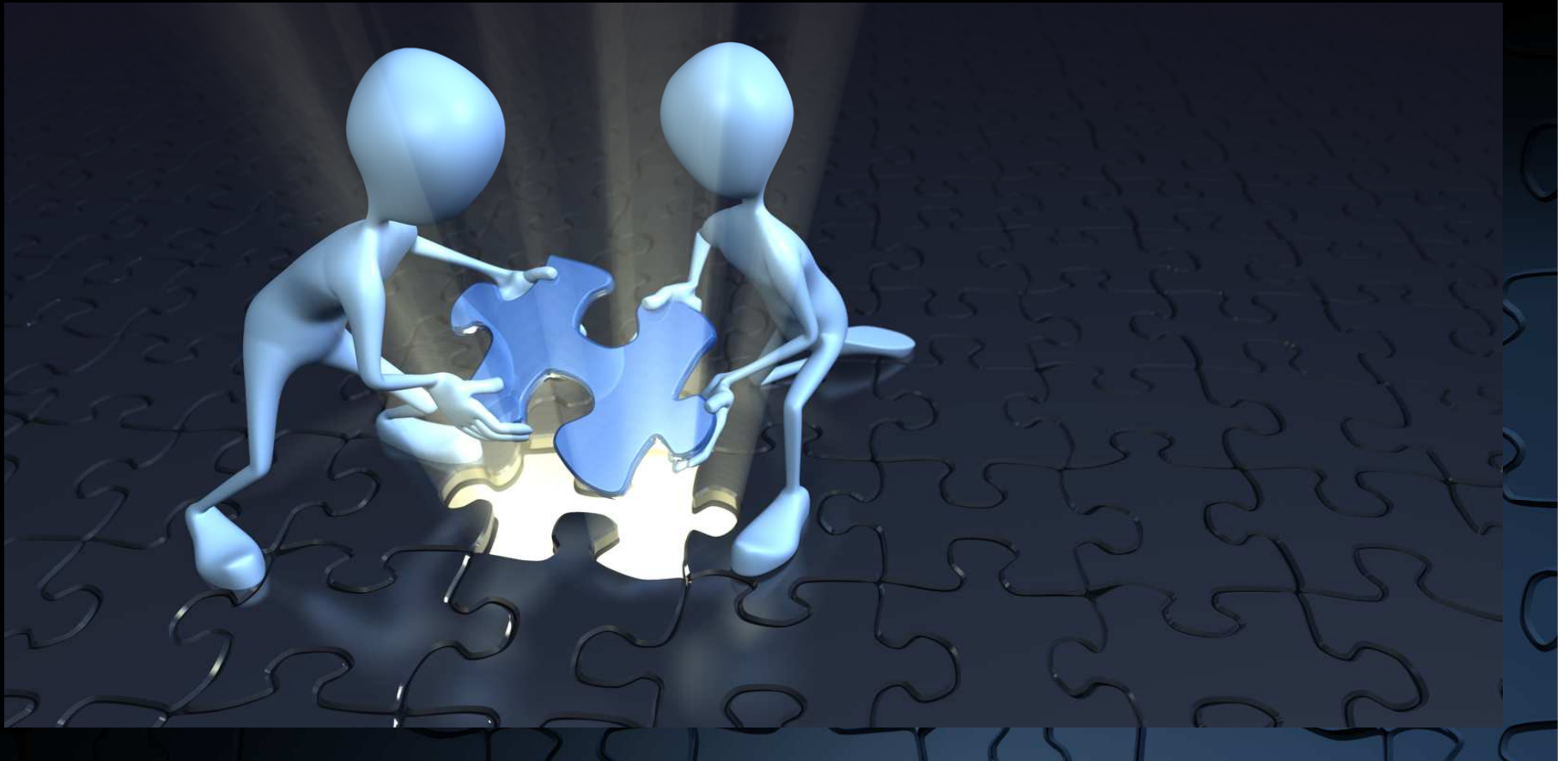


Becoming ...

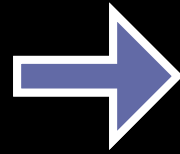
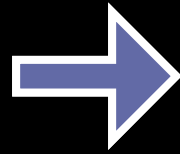
- Got moved so far to the back burner the it is often just gets lost ... Until someone doesn't perform
- Often, 'becoming' is just an after-thought added to the strategic plan for grins and giggles
- Comes up once a year when it's money time!



**The 'Thinking' - 'Doing' -
'Being' Sides of the Equation
Must Be Integrated**



The 'Thinking' - 'Being' - 'Doing' Integration



Thinking

- Where are we now?
- Where do we want to go?

Being

- Who are we now?
- Who do we need to become to get there?

Doing

- What do we need to do?



The HR Professional's Piece of The Puzzle

Being

- Who are we now?
- Who do we need to become to get there?



**There Was An HR Pro
That Got It Right!**



The HR Pro Who Got It Right

- Generated commitment
- Took stock of her resources
- Examined team members thoughts, values and beliefs and made changes where necessary
- Established a determined purpose



The HR Pro Who Got It Right

- Found synergies and dependencies

Integrated her strategic planning and her enterprise performance management activities

- Making course corrections where necessary!

Kept going till she got there!



Chief HR Officer – Oz Corp.

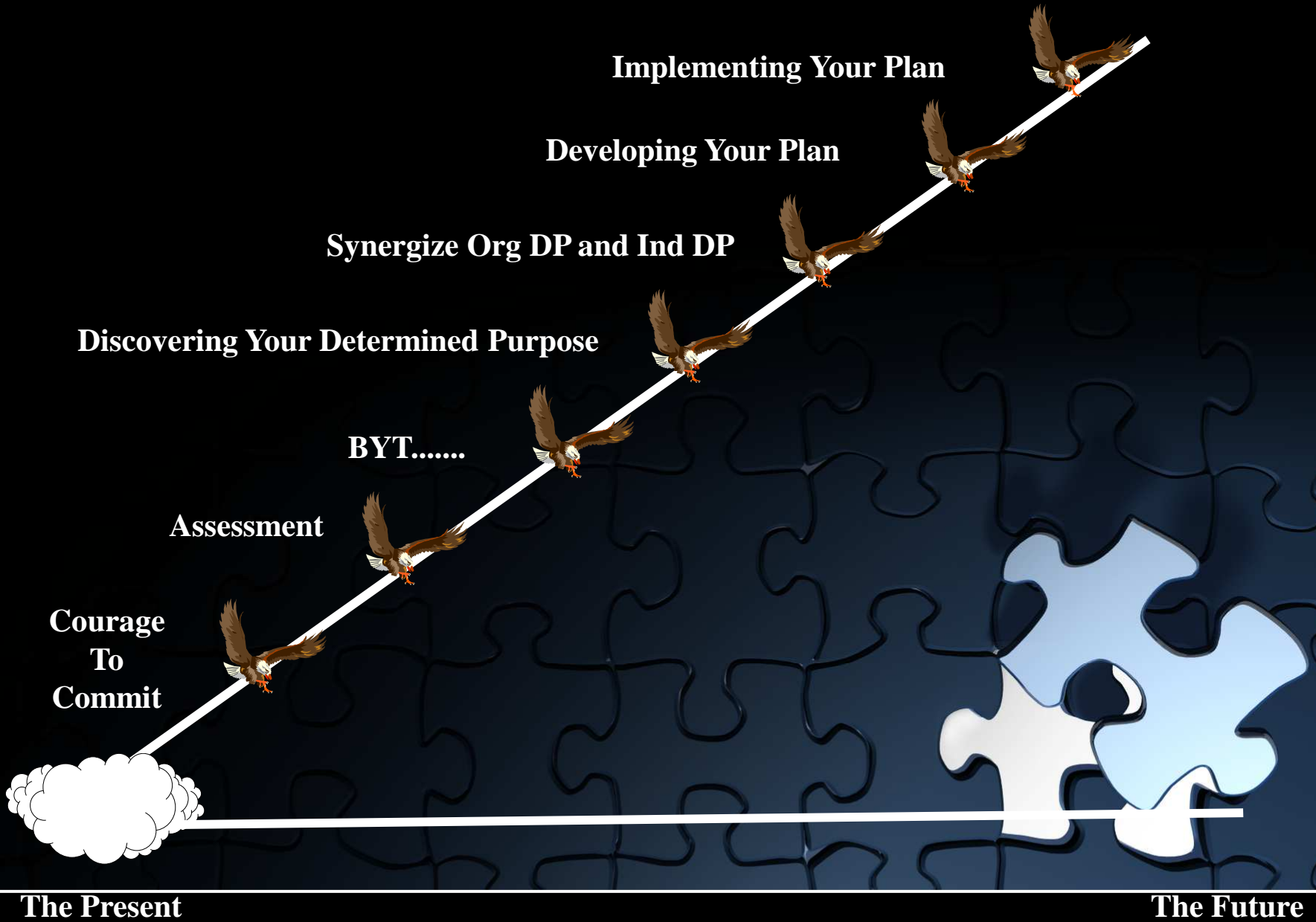
Dorothy Gale



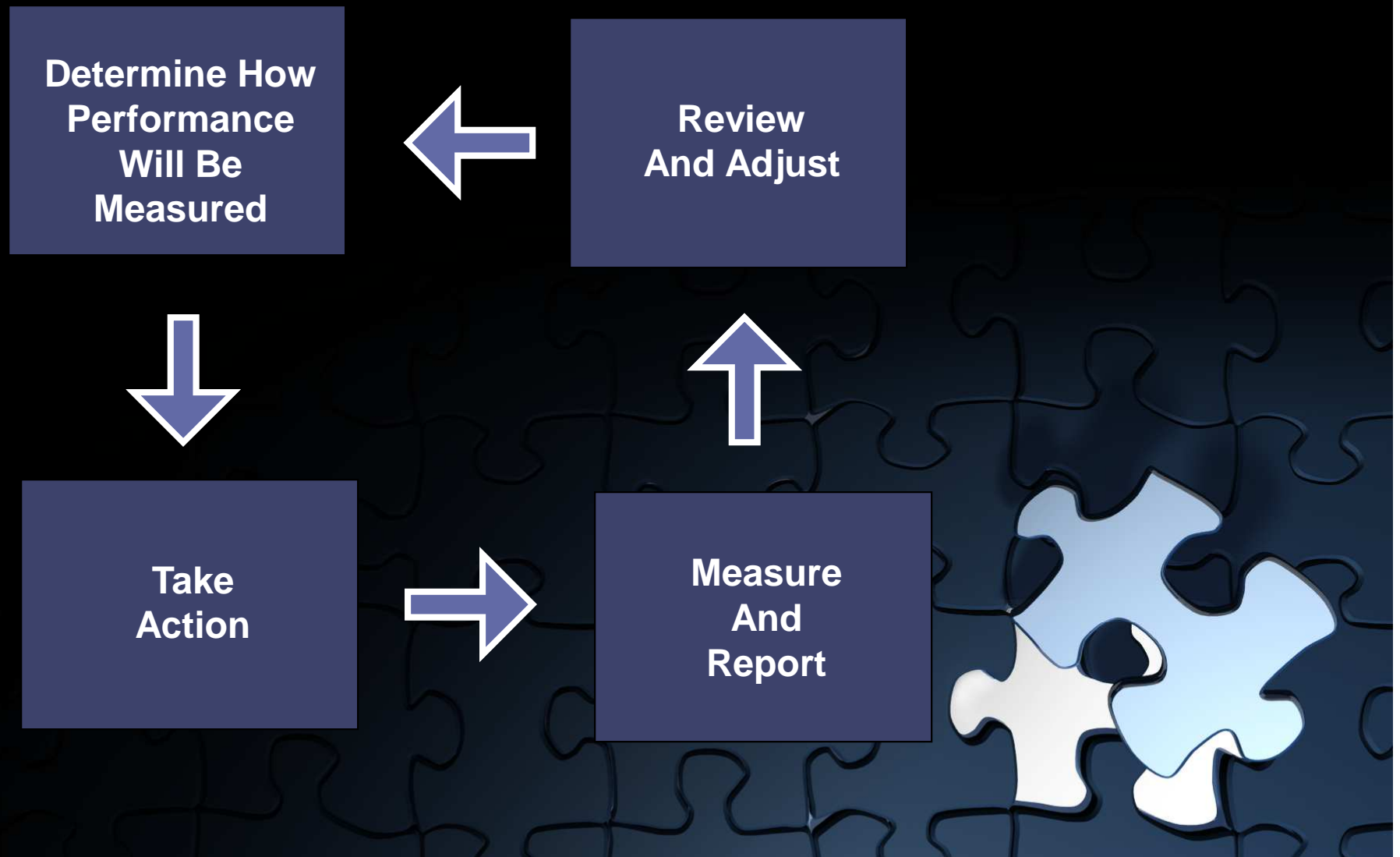
The Key Processes That Makeup The System



The Purpose Centered Leadership™ Process



The Enterprise Performance Mgmt. Process



The PCL™-EPM System

- An all-encompassing strategic planning and enterprise performance management system that integrates organizational planning, becoming and doing ...
- To make the most effective use of all organizational resources.
- Five (5) iterative phases



Phase 1



Where are we now?

Who are we now?



Phase 1 Step 1: Courage to Commit

“Until one is committed, there is hesitancy, ineffectiveness, always the chance to draw back.

But the moment one definitely commits oneself, then providence moves too.”

Goethe



The Fear of Commitment

- People have a very natural fear of committing
- “If I commit to ‘A’, I won’t be able to commit to ‘B’ if it comes along!”
- Expect ‘Push-Back’!



Leaders Make Subordinates Put In The Work

Hard work is the key!

The courage to commit comes from having putting in so much work and effort that it doesn't make sense not to continue forward

“Much good work is lost for the lack
Of a little bit more.”

West Point Boxing Rm.



Nothing Generates Commitment ...

Like A Contract!



Phase 1 Step 2: Assessment

Client Assessment

- Who are the customers/clients?
- What are their expectations?

Remember ... Clients include ...

- External
- Internal-Superior
- Internal-Peer
- Internal-Subordinate



Phase 1 Step 2: Assessment

Team Assessment

- Who are our team members?
- What can they do?

Remember ... Also consider ...

- Challenges and needs
- Key performance indicators
- Org structure
- Maturity

(forming; storming; norming; performing)



Phase 1 Step 3: Thoughts, Values and Beliefs

- You are what you think
- It is your thoughts that create reality
- Low self-esteem &
Low self-efficacy



Here We Generate....

- **Productive Attitudes**

- Can Do!

- **Effective Habits**

- Decide and act “Go thy way and as thou believed....”

- **A Healthy Self-image**

- I am worthy



Drive Out Learned Helplessness

- “We believe what we want to believe”
Demosthenes
- You can never be pitiful and powerful at the same time
- If inside, they feel helpless,
then outside you lose



Phase 1 Step 3: Thoughts, Values and Beliefs

- Core values
- The mission
- Team Standard of Behavior



Phase 2



Where do we want to go?

Who do we want to become?



Phase 2 Step 4 Vision and Purpose

- **Vision Narrative**
- **Vision Statement**
- **Determined Purpose Statement**

Remember ... They must be ...

- **Inspirational**
- **Clear and concise**
- **Realistic but challenging**
- **Empowering**



Phase 2 Step 5

Synergy and Dependencies

- Organizational DP
- Individual DP

Remember ... They all listen to ...

WIIFM

If you don't answer that question
They won't give you their
"A Game"



Phase 3



Building Castles & Foundations



Phase 3 Step 6 Planning

“If you have built castles in the air, your work need not be lost; that is where they should be.

Now put foundations under them.”

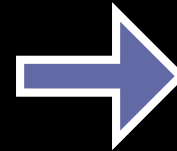
Thoreau



Phase 3 Step 6

Planning

Major Programs



Objectives



Projects



Goals
Tasks
Responsibilities
Schedules
Deliverables

Your Strategic Plan Must Be SMART

S Specific; Easily understood

M Measurable; Monthly milestones suggested

A Attainable; Not so difficult they're de- motivating

R Relevant; Congruent with the DP

T Time Bound; Gotta have deliverables



Phase 3 Step 6 Planning

Remember to Plan ...

Key processes

Resource utilization

Budget



Phase 4

“There is to do or not do.”



Phase 4 Step 7 Implement

Never try ... Do

“There is no try ... there is to do or not do”

Yoda

Effective Implementation is ...

- Developing tactics
- Executing processes and initiatives



Phase 4 Step 7 Implement

Developing Tactics

Develop your dashboard tactics

Develop your routine reporting tactics

Develop your formal reporting tactics

Develop your external and internal
communications tactics



Phase 4 Step 7 Implement

Execute your processes and initiatives

Execute your tactics

Be prepared to adjust on the fly

Be prepared for 'push-back'



**Phase 5 Review Your
Progress ...**

And Start All Over Again!



Phase 5

- * **Measure results against the plan,**
- * **Report results to all,**
- * **Review the strategic plan,**
- * **Adjust as necessary**
- * **And Start All Over Again!**



Questions, Review and Closing



**If Dorothy Gale could ...
So can you!**

Just Remember ...





1. Your team's greatness depends upon you as a HR professional.

You must know your worth and be confident in your ability to manifest greatness.





2. Maximizing performance means getting an 'A Game' from every team member everyday.

Come hell or high water.





3. There is great power in strategic planning and enterprise performance management.

But only if these processes are integrated into one iterative system.



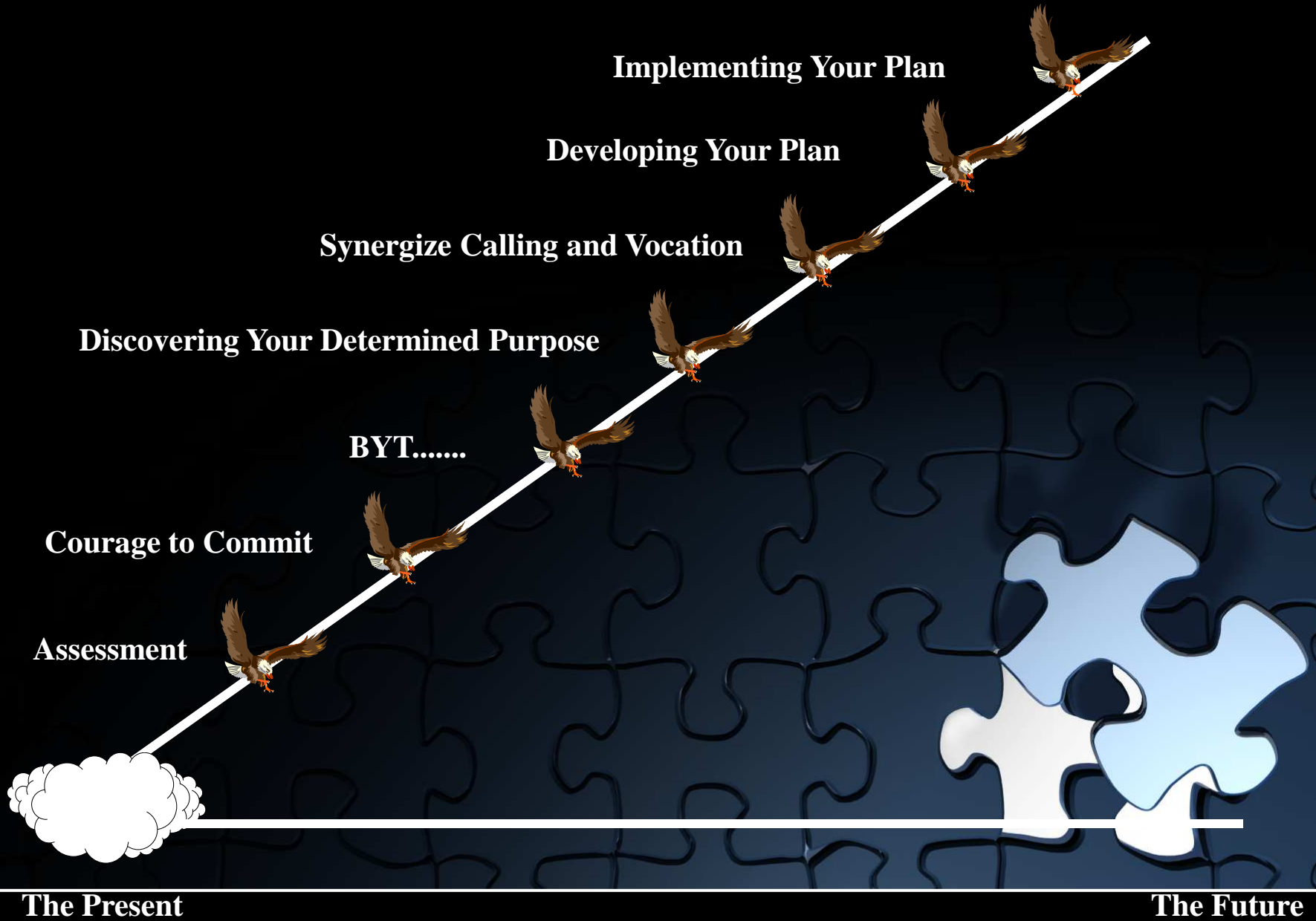


4. Concentrating on ‘thinking’ and ‘doing’ is not enough.

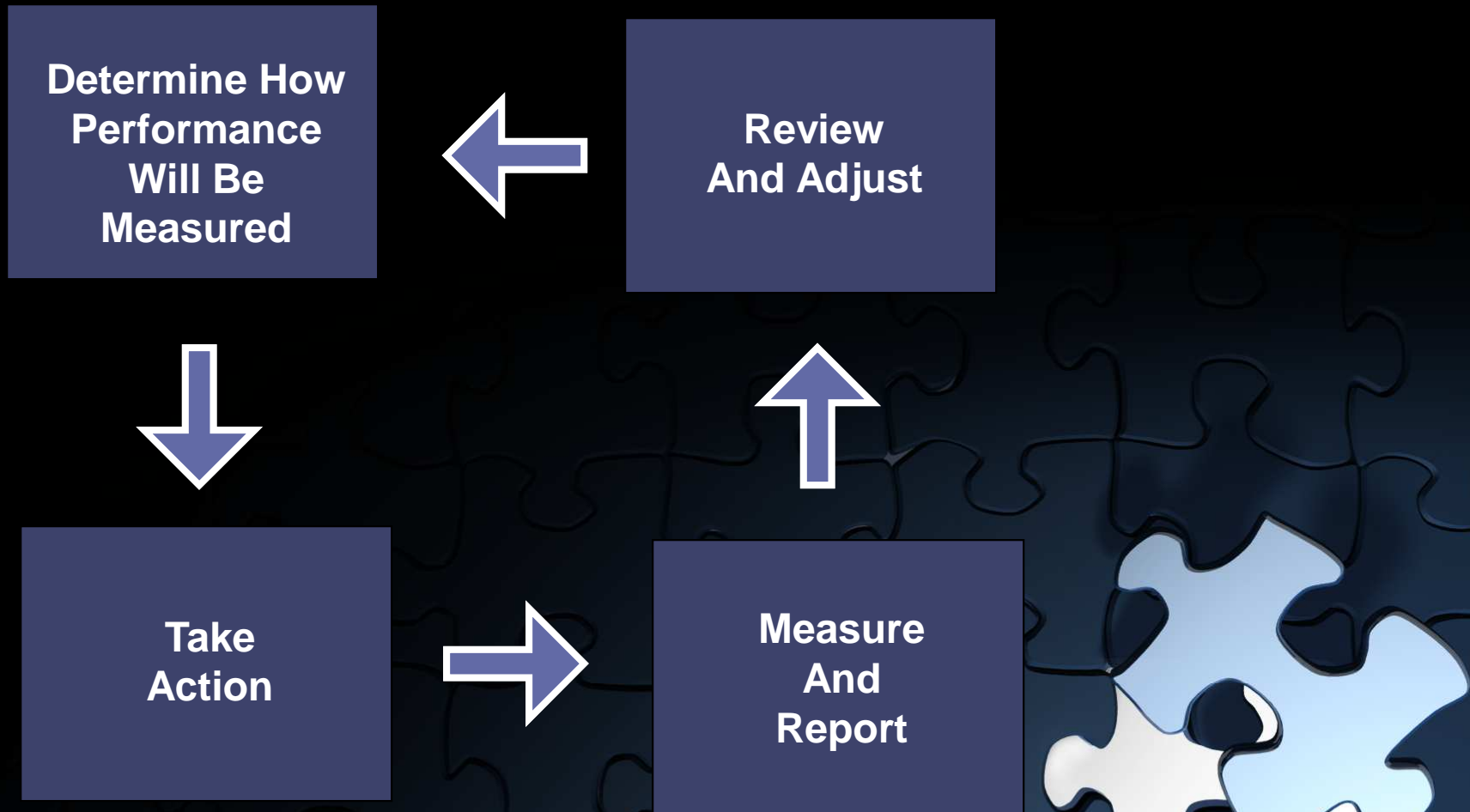
You must also concentrate on ‘becoming’.



The Purpose Centered Leadership™ Process



The Enterprise Performance Mgmt. Process



What if ... It all depends on you!





Eagles Nest Performance Management, Inc.

Conf. Presentations & Training
Performance Coaching
Enterprise Performance Management

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