

WHEN OPERATIONS DELAY FUTURE PROGRESS

Taking the daily operational hat off to focus on the future can be a challenge for the most adept business owner or manager. The day to day running of our businesses and organisations often demand our all, leaving little energy and focus for anything else. We tend to get caught up at ground level, fighting fires, dealing with staff issues and meeting budgetary shortfalls. Our minds are on making today happen, often neglecting the future planning and strategic progress that is so essential for success. When this is our 'normal', the ideal future gets delayed. The switch of hats, from operations to strategy needs to be a planned activity as more often than not, does not occur on its own.

A study in recent years concerning the disciplines of Australia's leading CEO's revealed that of the top three practices, the scheduling of time out for weekly review and reflection along with planning the future were paramount to their success. We would do well to practice the same. Being able to jump off at regular intervals the business or organisational boat we are sailing on; to sit on the sand and stare out at the horizon - thinking, planning, reflecting, will help us when jumping back onto the boat in operational mode. Time out and spent in this manner will enable us to take the ship more directly to its destination. These are some areas to centre on when practicing this discipline:

- Review of progress and results in recent days and weeks – the good, the bad, the ugly
- Key issues requiring immediate attention
- Activities that are irrelevant to the current journey and need to be stopped
- What were the successes and how can we further build on them?
- Where are we sailing to? What is our destination? Are we on track as far as the milestones previously established?

Taking time out to Review, Reflect and Plan is essential for managers and owners if they are to effectively lead and manage a growing organisation.

Below I have provided clarification around strategy and its associated areas combined with practical tips on how to move from operational to strategic work.

A. Strategy And Its Related Counterparts

In all of the books written on strategy you are likely to find as many varying definitions. For the purpose of this article my definitions are as follows:

Objectives: these are the key goals to which an organisation or company are focused on for their fulfilment. They are concrete, (not conceptual), have time frames for their achievement and create the momentum of all aspects of the organisations resources toward their fulfilment.

Strategy: is about the future. Strategy relates to a guiding statement or directive as to how the objectives will be achieved. All associated activities gain their 'place' in accordance with the strategic directive.

Tactics: the specific actions required to meet with objectives in keeping with the overall strategy

Plan: the organisation of tactics to be acted upon according to the resources of time and money

Operations: The actual fulfilment (the doing) of the tactics according to the plan

Examples

What do we want?	How are we going to get there? 'we will achieve our objective by...'	What are we going to do?	When will we do it?
Objectives	Strategy	Tactics	Plan
Double membership – end 2015	<i>To provide exceptional value to both our current members and the broader market from which our increase will come from; both professionally and in their personal development within the industry</i>	<ul style="list-style-type: none"> • Monitor Community News & other mediums looking for non members to promote membership of the association • Attendance at opportunities both metro & regional to promote association membership • Provide a monthly newsletter with relevant content 	<ul style="list-style-type: none"> • Daily • Research and schedule activities into main calendar • Send on the first of the month
Maintain 20% annual growth	<i>New market opportunities will be explored and opened in the West with current consumers product ratios increasing from 1.5 per consumer to 1.8</i>	<ul style="list-style-type: none"> • BDM recruited and positioned in the West • Direct mail program established to promote all current products to current consumers • Calls directly to current consumers to communicate additional products relevant to them 	<ul style="list-style-type: none"> • March 1st advertising for BDM with start date May 1st
Hold the number one position in the professional services sector within five years	<p><i>We will become known as the ONLY one in our field through:</i></p> <ul style="list-style-type: none"> - <i>providing relevant and informative content in various formats</i> - <i>the delivery of services with outstanding results;</i> - <i>authentic and honest client relationships;</i> - <i>high integrity and transparency in all our dealings;</i> - <i>delivering a national service</i> 	<ul style="list-style-type: none"> • National branding campaign through all association magazines and e-news • Establish memberships with all related organisations • Have a presence at all national trade shows • Monthly updates sent to database • Establish relationships with key alliances with significant reach • Monthly Webinars 	<ul style="list-style-type: none"> • List all relevant organisations, associations and their mediums of communication to members-January • Costing to be completed by Jan 31st • Campaign start Mar 1st • Webinars to begin monthly from May 15
Work three days per week – end 2017	<i>The business will be established, in terms of systems and people, to operate without the direct involvement of its directors</i>	<ul style="list-style-type: none"> • Estimator recruited • Project manager recruited • QA completed • Procedures documented for each division • Position descriptions completed 	<ul style="list-style-type: none"> • May 1st • July 1st • By end of Dec • Bob to manage beginning April • All staff to complete their current job roles by end March

B. Tips On Switching From Operations To Strategy

1. Schedule time for it

The key here is setting aside time regularly to review, reflect and plan.

- **Review:** is about looking back at the past week, month, year or years to see what has ACTUALLY happened in terms of numbers, key indicators, growth or decline, staff, inefficiencies, successes etc.
- **Reflect:** what is the review process and actual data communicating? Taking time to reflect on the meaning of this is essential for the next stage
- **Plan:** based on what HAS taken place and in light of your key goals, how do we continue progressing from here to there? From actual to ideal. What do we need to do, change and enact in order to drive this ship forward? Planning is also about scheduling the key activities identified from the above process into your calendar. It assists in taking it from your mind to the page, to the actual operational (action) stage.

In the visual below you can see the interaction between strategic work and operational work. Too many live in the Act stage without every entering the other three.

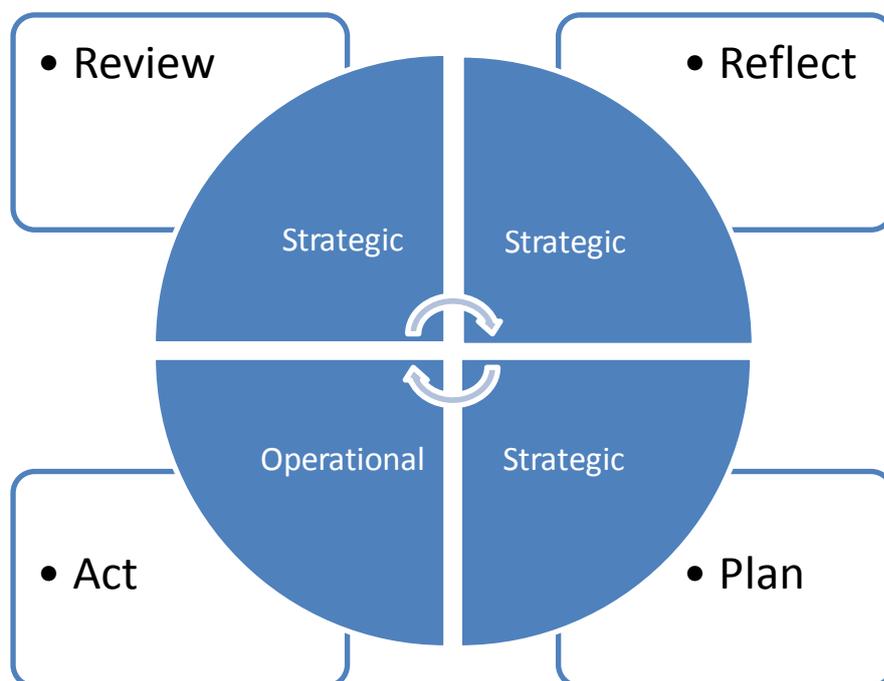


Figure 1. Operational Strategy flow

2. Keep a 'miscellaneous thought list' beside you

Often when taking time to think (and thinking is the hardest of all work), our minds are overrun with the urgent and a myriad of items we have to do. Our sons soccer game, the wife's birthday gift, the complaint from our key customer, the new website requirements etc. Keeping a notepad beside you to write these down as they arise is critical to keeping our minds focused in our strategic thinking time.

3. Ask how, what and why questions.

When considering for example a key objective, which might be to double membership of the association within two years, ask the following open ended questions:

- How will we achieve this?
- Given our current resources how is this possible?
- Why is this important?
- What is the impact it will have on current staffing, operations, systems etc?
- What are we currently doing that does not contribute to this objective?
- What impact will this objective have on us personally?
- What needs to change in order to reach this objective?
- Why would senior management buy into this?
- How do we communicate this initiative most effectively throughout the entire organisation and get buy in from every staff member?

4. Choose an inspirational location

It might be a hotel foyer, restaurant, coffee shop, the beach, mountains or the quiet surrounds of your lounge room or office but wherever you do your strategic thinking time, ensure it is in an environment that is conducive to creative thought with minimal interruption.

5. Do it with others

This might be with your senior management, significant other, mentor or coach, board or personal advisors but the power of collective thought can be incredibly beneficial.

Pros:

- Having others be a sounding board to help you think through potential strategy, pitfalls and opportunities
- Broaden your horizons – thought expansion
- Greater awareness of the ramifications of your decisions
- Drive your thought processes deeper
- Having people believe in you can be a powerful motivator

Cons:

- Can quickly get sidetracked if no outcomes are established for the meeting
- When talking strategy some tend to go straight to operations e.g 'the printer needs replacing - what brand should the new one be?'
- Non alignment of participants to your goals and strategy
- Meetings can be too long and drawn out. Require specific agenda and time frame
- If strong leadership is not present, 'circling' on an issue can delay outcomes

Summary

My observation is that strategic work is very low on the priority list of most leaders.

So as a final encouragement...take time to switch hats. From operations to strategy. The discipline of taking regular time off the treadmill to review, reflect and plan and then to put this back into the active operational mode of your organisation will pay incredible dividends.

Good luck!!