

JEFFREY MAGEE

Annual Strategic Planning must be Monthly Execution Planning to Dominate Your Marketplace

If anything became clear from the global pandemic of 2020-21, it is how many businesses and leaders had done a miserable job at strategic planning. And, worse yet, how many global leading think-tanks and consulting firms were caught with their managerial-leadership pants down at their client's expense - and years later the fallout damage continues!

The number of organizations dispensing information, articles and SOPs 18-to-24 months after the world started shutting down in March 2020 is endless, and, quite embarrassing actually. The real evaluation questions are simple, if your product, service or deliverable was relevant in January 2020 it should have been relevant at the height of COVID and still today. If your product, service or deliverable was NOT relevant at the height of COVID, then why in the world would someone want to listen to or engage with you today?

One hundred percent of our clients assumed a transformational role, not a change mindset role, prior to COVID, during the time window of COVID and each deployed what strategic guidance they were already committed to, and for those reasons they dominated their respective markets.

Get a copy of the [Changeformational](#) article that appeared in Vol. 31 No. 1 of **Professional Performance Magazine** ([ProfessionalPerformanceMagazine.com](#)). This topic is a business development component and discipline from our Leadership Mastery course, from the

Leadership Academy of Excellence series.

Imagine that there are always three categories of businesses and leaders in good times, normal times and in challenging times: Those that will Thrive, Survive and those that Die.

I like to ask audiences of business leaders ... If we were to roll back the clock and had a gathering of business leaders in one room in January 2020, and each were asked by show of hands, "Do you have a strategic business plan for this coming year?"; most would easily have had raised their hands. If the same group were asked by June 2020, "How many of you are finding your annual strategic business plan has been thrown out the window?"; an equal number of hands would probably have gone up.

In fact, in my thirty years of business and business advising, it is far too often the case that when I ask people if they have a Strategic Business Plan, most say yes. When asked to hit print and send it to me, most fidget at realizing they don't really have one or that it was too grandiose. And, for the small percentage that actually do, few of them actually use it as a living document to measure objectively off of and calibrate accordingly to on a daily-weekly-monthly-quarterly to ensure annual success - the very success measurements, goals, KPIs (Key Performance Indicators) they created.

Along these same lines could be the application of not just ones' Strategic Business Plans, it could be ones' own or departmental or organizational Success Plans for talent.

Years ago, I was the featured Keynote Speaker at an AICPA Annual Conference of the top 100 CPA Firms in America, their Operating Senior Partners (aka CEO/COO

in most other businesses) were the audience. When I pushed these very questions to them, along with succession planning survey questions, it was staggering at the percentages recorded in real time in my presentation and displayed at the front of the room on a screen. That night one of the Senior Partner's of a leading firm shared a horrific anecdote with me at the reception - ... Dr. Magee great presentation and thought-provoking questions ... while we engage in this work for our clients, the reality is we are making so much money, we don't really care about what they do in between our meetings!

Here are a few KPI considerations for your Annual Strategic Business Plan, personal or Human Capital poised Succession Plan(s), albeit not conclusive, that the pandemic put a spotlight on as blind spots for most. And, your plan should be benchmarked monthly against executable deliverables to ensure you are on trajectory.

If the smart business leader learned anything through this decade's disruption, it is that every decade for the past Century has held at least one massive global economic shift/trajectory change that has challenged all businesses to evaluate what they were doing before, during, and after the disruption.

And to those that apply the Business Disruption Cycle™ (or variational of the Grief Cycle used in psychology as a bell curve), disruptions will always be leveraged opportunities. The successful individual and organization will be the one that can anticipate, stimulate and ultimately mitigate the percentage of time spent on the left side of the bell-curve and leverage the time available at the top, to accelerate the optimal points on the right side of the bell-curve.



Consider this Business Disruption Cycle model (and feel free to add KPI's on either side and within the ascension and dissention as appropriate for you). And, remember that the majority of people (employees, customers, citizens) live to love to be on the flat-line on either side of the bell-cure, it is the bell-curve that creates the disruption and chaos for most people.

Annual Business Planning to Monthly Execution Planning comes down to a few simple macro measurements. Most people like to wake-up each day and have to some degree a set of expectations, routines, norms or standard-operating-procedures (SOP) to play by (aka that flat-lines). When these are interrupted or disrupted, most people simply want to know the new expectations, routines, norms or standard-operating-procedures (SOP) to re-appear in a manner in which they can understand, embrace and execute. Consider these:

- **KPI** of what excellence via goals, accomplishments, new roll-outs, progression analytics, performance scorecards, etc., looks like step-by-step must be clearly identified; To be transformational your leaders and SMEs should strategize what this looks like and must be in best of times and identify what these may look like in the worst of times!

Then ensure that these are sequenced in a manner that you can always clearly and objectively determine if you are on schedule, ahead of or behind schedule. This then allows for real-time allowances and adjustments, so no one is ever once again caught in a losing proposition, at the end of a measurement cycle or year.

- Second, these will directly correlate to the executable **TDRs** (Tasks, Duties and Responsibilities) necessary from both the human capital via positions and jobs to the automation and technology; To be transformational your leaders and SMEs should strategize what this looks like and must be in best of times and identify what these may look like in the worst of times!

Knowing what the exact work-product activities, processes, procedures, tactical behaviors that are meaningful and generate the real ROI is critical in this phase.

- Third, this then will make obvious the **KSAs** (Knowledge, Skills and Abilities) that both the human capital and or automation owns and must execute; To be transformational your leaders and SMEs should strategize what this looks like and must be in best of times and identify what these may look like in the worst of times!

Remember, unless your name is Google, you can't know everything. So, the developmental process of KSA is sequential, chronological and takes time. Building within oneself and in others the level of KSA for success, takes commitment, discipline and time. Are you will to make that a reality within your team or outsourced team?

However, for most people the reality when an interruption or disruption appears, is to go into a series of self-defeating and self-alienating actions – psycho drama. As indicated in the Business Disruption Model above, at any interruption or disruption point, the SOPs/NORMs are challenged and human emotion and psychology are triggered. The amount of or percentage of time one spends ascending the bell curve in “denial” endeavors, “anger” episodes or “blame” gaming, only hinders ultimate success and can actually create the trajectory that derails one into survival mode, or worse yet a decline and death spiral.

Here are a few strategic questions to be asking and addressing into your Annual Strategic Business Plans that will directly impact our Monthly Execution Planning endeavors – and impact your ability to forecast impending interruptions or disruptions to your organization. And, yes, incorporate your already known Best-Practice regimen, After Action Review data, root cause analyses, etc., consider:

1. If we benchmark our last three years financials (AP/AR), or whatever the critical data you need to track, against your then plans, what would it reveal as to patterns, target goals/KPIs accomplishments or unexpected pivots made in that period? Then, how was that leveraged in the subsequent year?
2. What are the analytics of your performance Scorecards (Job Descriptions, Performance Reviews, Goals, etc.) by SBU (inclusive of all layered iterations therein) and Individual and did it matter?
3. Do we know, what are/were the analytics of your rivals/competitor's performance Scorecards by SBU, Individual or in General and did it matter?
4. What are your core deliverables and how are they market connected?
5. What is your capacity limitations and opportunities?
6. What market challenges and challengers are there now and in your foreseeable future?
7. How secure are you in our Human Capital/SMEs retention (Flight Risk)

and engagement (Intent-to-Stay)? And, what is your onboarding ability for future labor and talent acquisition?

8. How do you leverage your assets and human capital in thriving times, sustainment times and in challenging times?
9. How do you know if your Human Capital is outperforming market potentials, performing to market-share opportunities, or merely appear as a rock star internally and coasting?
10. Where are the current opportunities for our business and where is the emerging business opportunities?
11. What is your GO/TO plan at the moment of interruption or disruption? And, who are the critical SME's to be involved?

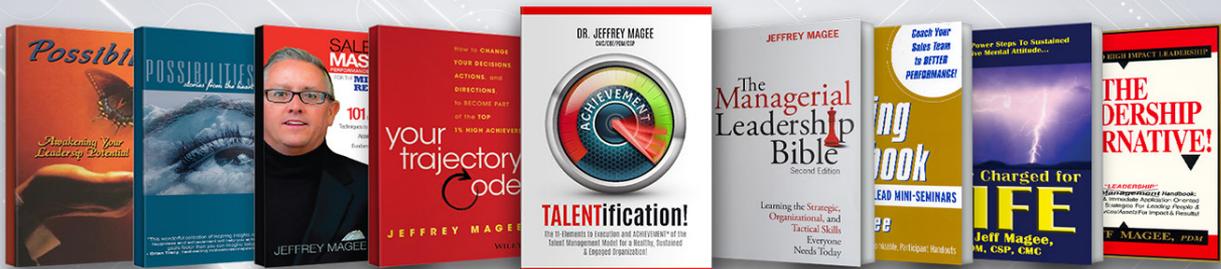
The ability for organizations and individuals to encounter an interruption or disruptions and have already calculated that KPI happening (transformational thinking and leading), allows one to leverage opportunities and gain momentum within the marketplace. This subsequently, allows one to pull and unite energies at “Acceptance” and immediately deploy or engage in “Option” ideation to maintain success and experience even greater success within the Business Disruption Cycle™.

This became another critical lesson learned when the Enron's (2001-2008; Adelphia, Tyco, MCI, Lehman Brothers, Washington Mutual, Arthur Andersen, and many other global brands) of the world imploded, that all of the power pundits, consulting firms and academics all missed, came true once again in the 2008-2010's economic recession to hit America, and then 2020-21 global pandemic, only proved our models (Dr. Jeffrey Magee | Leadership Mastery Series) to be massively correct.

And, three additional strategic essentials to be the secret sauce to SUSTAINED WINS when everyone else is falling – for those three critical revelations, email us at Jeffrey@JeffreyMagee.com!

Accurate monthly strategic planning execution reveals why many thought of these implosions as accounting failures, and many new laws, regulatory processes and procedures followed to address what became a favored business school case study implosion for years. Yet, the real talent issues that lead to these implosions were completely missed by all involved – and to this day still missed!

Two years after COVID has left the global scene 85% of the restaurants on the Las Vegas Strip are still closed or partially open ... The consolidation of rental car brands, hotel chains and airlines has monopolized the travel/hospitality industry ... The



Dr. Jeffrey Magee



30 Top Brands that filed for bankruptcy during COVID leave the reader stunned, the shift in worker mentality, customer expectations and future employment trends have been changed forever!

If anything became clear out of the global pandemic of 2020-21, what was it to your organization and to you professionally individually?

How have you made yourself as bullet-proof as possible from the lessons you learned, as you enter this next decade?

Jeffrey Magee, PhD/CBE/CMC/CSP/PDM is the "Thought Leaders Leader," publisher and editor-in-chief of Professional Performance Magazine, editor of the *Leadership Mastery* and *Sales Mastery* blogs, a former nationally syndicated Radio Talk Show Host, as well as, a published author of 31 books translated into 21 languages which includes four best-sellers (*Your Trajectory Code*) and four graduate management textbooks (*The Managerial-Leadership Bible*). He works with business owners and C-Suite Leaders to significantly increase their organizational effectiveness through progressive innovative Human Capital talent development initiatives, coaching, and senior level advisory work. He is a leadership columnist and highly sought global professional speaker on performance psychology. The recipient of the United States Junior Chamber's Ten Outstanding Young Americans (TOYA) Award and the United States National GUARD's Total Team Victory Medal for civilian contribution to the Armed Services.

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