



MAY 2014

ISSUE: 24



## STRATEGIC ACTION

### Ask Roxi MAY Question

Dear Roxi,

Lights - Camera - Action! Just Do IT! Call to Action! Push for Action! Take Action!

We hear these phrases in our language, media, and board rooms...all the time. "If not now, when?" is often intended to be an inspirational question urging people to act NOW! These are uplifting phrases, and yet without a good plan, the action could take us to the wrong places with the wrong people at the wrong time.

So yes, we need a PLAN...and...we need ACTION!

In the last 6 months, no fewer than five organizations have asked me to help

What should I do when my leader institutes big or even small changes that impact my staff without involving me?

#### ANSWER:

This leader sounds like he or she is running short on organizational and relationship Emotional Intelligence. Keep your cool and do your very best to provide objective DATA about the impact of this behavior in very real terms - like cost, morale, disruption

them "Create a Strategic Plan." I proceed to lay out my very simple process for helping them get where they want to go. I tell them I don't use a complicated process because I believe what people really need is a road map to help them focus on the right things for the right reasons at the right time. If they want something more complex, I'm not their gal. Believe it or not, I nearly always hear an audible sigh of relief!

Just saying the words, "We need a strategic plan," often elicits a groan, eyes roll, and don't be surprised if people are actually thinking, "Here we go again, another waste of time." In fact, strategic planning has gotten such a bad name, it can even be disincentive for anyone to care, pay attention, or take you seriously. They are only doing "it" because they have to.

Everyone likes to have a clear sense of direction, a plan, and an end goal that can and will be accomplished. That's why we need to create a smart plan of action, something I call **Strategic Action**.

Let me be clear. I am a big-time planner by nature. It drives people around me a bit crazy sometimes because I am always asking about the plan and, yes, I have been known to get a bit annoyed when **the plan** changes without a new one in place. The plan is the precursor to the ACTION. It is definitely needed, it can even be fun to do when done well, it can engage people, generate fantastic ideas...AND still **it's only half the loaf**.

So why do eyes roll and why do people moan? Because most strategic plans come to nothing or almost nothing. I wish I had a dollar for every "Strategic Plan" or "5 Year Plan," sitting on a dusty shelf. Every one of those musty shelf-dwelling "Strategic Plans" cost those leaders and their organizations a LOT more than a dollar in human effort and lost productivity.

So how do we get where we need to go? There is a better way, a simpler way, a successful way...

[Click Here to Read More about my FIVE STEP STRATEGIC ACTION PROCESS](#)

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## **DO NOT DO THESE 5 THINGS WHEN PLANNING**

**1. PLAN IN A VACUUM:** Doing it all by yourself or with a tiny group of insiders gets you nowhere fast. Include as many perspectives and as much wisdom as you can and that makes sense for your organization - perhaps including your customers.

**2. FORGET YOU ARE CREATING CHANGE:** Whatever comes out of this will generate a whole lot of change, no question about it. Do you have a change process in place for managing all that change? Do you have executive sponsors for the change, change agents, people who will oversee the process? Are you including all the people impacted by the changes?

**3. PRETEND YOU ARE OPEN WHEN YOU ARE NOT:** If you have an agenda and a clear picture of the end game you really want, then don't pretend you don't. People will smell it a mile away and you will lose trust and support for this situation, and much, much more down the road. If it's your plan and your idea and your strategy, then say so, and be clean about it. Then remember you get to own it and take responsibility for that decision.

**4. MAKE IT COMPLICATED:** This truly is NOT complicated. Reading books, hiring specialized high paid consulting firms, applying the latest and greatest

to customers, or whatever you believe the surprise is costing the organization.

In addition, it's really time to "manage UP" here. Use Constructive Feedback tools to create a non-defensive conversation about your leader's goals, and how you'd like to help her or him reach them and share your observations and the impact of those things that are getting in the way.

As for your staff, if they hear it the same time you do, again, do your very best to be honest without showing your angst. Tell them you were unaware of the change AND that you will investigate the situation and get back to them as soon as possible.

**Don't throw your boss under the bus with ANY of your staff! It's not professional and it will come back to haunt you.**

Finally, if this behavior continues after you've done all you can to help solve it with your leader, ask that you, the leader's leader and the leader have a meeting to discuss how change is executed in your area of responsibility so you can manage it, and guide your staff through it successfully.

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"Balanced Scorecard" or "6 Sigma" model, and pulling your hair out, is **not necessary**. There really are only a few things that matter - and those things REALLY matter. So just get those right.

**5. KEEP IT A SECRET:** Secrecy is the enemy of a good plan and good execution of the plan. If you hold on to it too close and tight until you think you've got it just right, you will shock your system, it will feel like a "left field" idea and change, and you will have gained no buy-in. Buy-in is needed because there is nothing you can do all by yourself. Really, nothing at all. Be transparent and be open to questions and alternative ideas all along the way.

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## NEWS



I'm happy to share news that my novel, "**Cross of Ivy**," written 25 years ago, will be released by Koehler Books Publishing in the summer of 2015. While this book is fiction, readers will get a good sense of what can happen when leaders find themselves in difficult ethical situations.

For those who may have missed the earlier announcement, my newest book, "**Lead Like it Matters...Because it Does**" will arrive in bookstores October 17th. It is currently available for pre-orders from [Amazon.com](https://www.amazon.com). It would be really wonderful to feel your support. I truly believe you and people you care about will see it as a useful handbook, workbook, and playbook for leadership learning and practical advice, no matter where you are in your leadership journey today.

Of course, I'd love for you to visit

[AskRoxi.com](https://www.AskRoxi.com)

**Coming Soon:  
AskRoxi Advice and Member Blog**

There now there are 5 ways to connect with each other and me...

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These 3 links are right here..... [f](#) [t](#) [in](#)

## QUOTES

### QUOTES OF THE MONTH:

"Vision without execution is hallucination."  
Thomas Edison

"...It is not enough to stare up the steps, we must step up the stairs. " Vaclav Havel

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"Life is what happens to you while you're busy making other plans."

Allen Saunders

"Leadership is the capacity to translate vision into reality."

Warren Bennis

## SPREAD THE WORD!

**I encourage you to share this newsletter with anyone you feel would enjoy it. Remember, past newsletters on a wide variety of leadership topics are located in the archive in the link above right. Just click and read. Enjoy!**

**See you in May!**

**Fairly yours!**

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