

THE STRATEGY THAT REACHES THE FLOOR · CHAPTER ONE

Three Priorities on a Card

A strategy reaches the floor when it tells one person which of two good things to choose on an ordinary morning.

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A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

A strategy reaches the floor when it tells one person which of two good things to choose on an ordinary morning. It is twenty to nine on a Monday, and the claims office on the second floor is still half empty. On every desk there is a card the size of a postcard, left overnight by someone from internal communications, and the team leader of the household claims team is holding hers beside a cup of tea she has not yet tasted. The card is well made. It has the company's new name for its strategy across the top, and under it three priorities in a confident serif: Members first. Simpler every day. Grow with care. On the back, a line from the chief executive thanks everyone for the part they will play.

CHAPTER ONE

Three Priorities on a Card

A strategy reaches the floor when it tells one person which of two good things to choose on an ordinary morning.



Three Priorities on a Card

HAUTE LUMIÈRE · THE STRATEGY THAT REACHES THE FLOOR · CHAPTER ONE

Twenty to nine, the card

It is twenty to nine on a Monday, and the claims office on the second floor is still half empty. On every desk there is a card the size of a postcard, left overnight by someone from internal communications, and the team leader of the household claims team is holding hers beside a cup of tea she has not yet tasted. The card is well made. It has the company's new name for its strategy across the top, and under it three priorities in a confident serif: *Members first. Simpler every day. Grow with care.* On the back, a line from the chief executive thanks everyone for the part they will play.

At five past nine the first claim of the week comes up on her screen. A burst pipe under a kitchen floor, a family with two small children, a request to settle today so the plumber can start tomorrow. The procedure says a claim of this kind goes to a loss adjuster first, which takes about a week. *Members first* says settle it. *Grow with care* says check it. *Simpler every day* could be read either way. She turns the card over, as if the answer might be on the back, and it is not. Her shoulders already know that whatever she decides will be the wrong one for somebody upstairs.

She is a composite, drawn from the way these mornings are described in the research below and in the house's own practice, and no firm is meant. Most people who have worked inside an organisation that has recently launched a strategy have held that card.

Ammanuel Santa Anna's canon has a sentence about plans of this kind that is uncomfortably exact about where they were written.[1] Writing of what governance produces when it does not see itself, it says that it "generates the kind of strategic plans that look brilliant on paper and crumble on contact with reality — because the reality they were designed for was the projected reality of the most powerful people in the room, not the actual reality the organization inhabits." The card was designed for a room on the sixth floor. The burst pipe is on the second.

This chapter makes one claim. A strategy has not reached the floor when it has been communicated; it reaches the floor when it tells one person which of two good things to choose on an ordinary morning. Until then it has been announced, and the work of deciding what it means has been handed, without anyone saying so, to the people least able to see the whole of it.

Communicated, not understood

In March 2015 three researchers published in the *Harvard Business Review* the findings of a long survey of managers inside large organisations.[2] Donald Sull, Rebecca Homkes and Charles Sull had asked, among many other things, how often senior leaders talked about strategy and whether the managers below them could say what it was. Most managers, as the study is reported, believed their leaders communicated the strategy often enough. Yet only about half of the middle managers asked could name even one of their company's top five priorities. The authors framed this as one of five myths about execution: that communicating is the same as understanding.

The evidence should be graded before it is leaned on. This is survey work published in a practitioner magazine, not a peer-reviewed study, and the figures here are taken from the article as it has been summarised, because the original text was not reachable for this book. Self-report about one's own knowledge of a strategy is a limited instrument. What the finding shows with some confidence is the shape of the gap: the people sending the strategy and the people receiving it describe the same communication very differently, and the senders are more satisfied with it.

It is not a new observation. In 1989 Donald Hambrick and Albert Cannella argued that implementation is a matter of substance and of selling, and that the selling has to go down, across and outward as well as up, to everyone whose daily choices the strategy depends on.[3] Their point was not that strategies need more slogans. It was that a strategy which is not understood well enough to argue with has not been sold at all; it has been distributed.

The card on the claims team leader's desk is distribution. It tells her the strategy exists, and that it matters to someone. It does not tell her what it asks of her at five past nine. Santa Anna's canon, describing who must be in the room when a value stream is mapped, puts the difficulty in one sentence that would serve as the first line of any deployment plan: "The executive who sees strategy, the middle manager who sees implementation, the frontline worker who sees daily reality — each holds a piece of the picture that the others cannot access from their vantage point." The card was written by the first, carried by the second and left on the desk of the third. Nobody asked the third what she would need to know.

There is a temptation, faced with findings like these, to blame the people who could not name the priorities. That reading has the direction wrong. When half of a capable management population cannot repeat what it has been told many times, the likeliest explanation is not that half of them were not listening. It is that what they were told did not attach to anything they do. A priority that never changes a decision is easy to forget, because nothing in the working day ever reminds you of it.

A map with arrows

The most influential attempt to close this gap came from Robert Kaplan and David Norton, who spent the 1990s arguing that a firm's measures should tell the story of its strategy. In a 1996 paper in *California Management Review* they set out how the balanced scorecard could be linked to strategy, with its financial, customer, internal-process and learning measures joined by chains of cause and effect, so that a person could in principle read from her own measure up to the strategy it served.[4] Their later book, *Strategy Maps* (2004), drew those chains as a single page of boxes and arrows.[5]

The house's Luminous 100, its reading of the frameworks every consultancy sells, is generous to the idea and notes the thing practitioners tend to find for themselves: "The strategy map connecting the four perspectives is often more valuable than the scorecard itself." The map is valuable because it forces a leadership team to say, in public, what it believes causes what. It replaces *members first* with something closer to an argument: if claims are settled faster, members renew; if members renew, the cost of winning new ones falls.

The same reading carries the map one step further, in its own terms. Living-systems awareness, it says, "transforms the strategy map from a linear cause-and-effect chain into a living circulatory system". Read plainly, that is a warning about where the arrows stop. On most maps they stop at the department, because the department is the smallest unit the people drawing the map can see. There is a box for claims and an

arrow from it to member retention. There is no arrow to the team leader's screen at five past nine, and that is the arrow that decides whether the rest of the map is true.

This is not a criticism of Kaplan and Norton's tool. It is a description of how tools are used. A map drawn at the top and handed down is still a message from the sixth floor; the arrows are the leadership team's beliefs, and they are only tested when somebody on the second floor makes a choice and the result comes back. If nobody on the second floor knows which arrow her choice belongs to, the map cannot learn. It becomes a picture of a strategy rather than an instrument for running one.



What the card leaves out

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What the card leaves out

Look again at the three priorities. Each of them is something nobody could disagree with, and that is the trouble. A strategy is a set of choices, and a choice has a cost: it says what the firm will do when two good things conflict. *Members first* and *grow with care* conflict every time a claim could be settled quickly or checked carefully, which in a claims office is most of the day. The card names both goods and leaves the conflict to the reader.

The historian and consultant Stephen Bungay, in *The Art of Action* (2011), traced this problem to the Prussian army of the nineteenth century, and described three gaps that open between a plan and its results: between what leaders would like to know and what they know, between what they want people to do and what people actually do, and between what they expect actions to achieve and what those actions achieve.[6] His argument, summarised here from the book and not reopened for this book, is that the usual response to each gap, more detail, more instruction, more control, widens the next one. The army's answer was to pass down intent rather than instructions: what is to be achieved and why, and the freedom to choose how. A subordinate who knows the intent can decide well when the situation changes, which it always does.

Santa Anna's canon arrives at the same principle from the other direction, asking where the intelligence for a decision actually lives: "If the intelligence lives on the frontline — as it does for most operational decisions, customer interactions, and day-to-day process adjustments — then the frontline should make the decision." The burst pipe is exactly such a decision. The team leader knows the family, the plumber, the photographs on the file and the eleven similar claims she settled last month. What she lacks is not judgement. It is the intent: which of the three priorities governs when they conflict, and how much risk the firm is prepared to carry to keep a promise to a member.

The canon has a name for a priority that floats free of that kind of decision. Writing of the room every organisation keeps without a door, it lists among the exhibits "The fact that the values on the wall bear no resemblance to the values in the hallway." A card on a desk is a small wall. If the team leader settles the claim and is later asked why she skipped the adjuster, she will learn what the value in the hallway is, and so will the eleven people who sit near her.

There is a cost here, and it is worth naming plainly because it is usually invisible. Every team leader in the building is resolving the same conflict on the same Monday, separately, without telling each other. Some will settle; some will send everything to the adjuster to be safe. The firm will pay for both: in members who leave because they waited a week, and in claims that should have been checked. Each of those costs is foreseeable, and none of them appears in any report as the price of an unclear strategy. They appear as claims performance, as retention, as leakage, each owned by a different department. The difference between a strategy decided once, clearly, and the same strategy decided nine ways on the second floor is real money, and nobody measures it. How it could be measured, [honestly enough that both sides would sign the number]({{BOOK:orgdev-flow}}), is a question the house has answered elsewhere.

Why the card says so little

It is worth asking why the card is written the way it is, because the people who wrote it are not careless. The three priorities were agreed in a room of eight executives over two away-days, and each word was argued over. *Members first* was the chief operating officer's phrase. *Grow with care* was the finance director's, added late, after a long afternoon about the cost of claims. The two of them disagreed, at the table, about whether the firm should settle more claims quickly or check more of them carefully, and the disagreement was resolved in the way such disagreements often are: by keeping both phrases.

That is the hidden mechanism behind most strategies that arrive as three good words. The vagueness is not a failure of drafting. It is the residue of a choice that the leadership team did not finish making, written down in a form that allows each executive to read it as a victory. The card is the minutes of a truce. It travels down the building intact, and then it lands on the second floor, where the truce cannot hold, because the team leader has to settle the claim or send it to the adjuster, and there is no third option.

Santa Anna's canon describes what a room looks like when it agrees in this way. Writing about the quiet signs that a group has stopped engaging, it lists among them "Compliance without commitment. Agreements that carry no energy. Head nods that are automatic rather than genuine." The away-day ended in agreement. The agreement carried no decision, and so it carried no energy down the building either.

The cost of the truce is not paid by the people who made it. The chief operating officer and the finance director will each, in the coming quarter, see evidence that their reading was right: faster settlements in one report, lower leakage in another. Both can be true, because nine team leaders are resolving the conflict in nine directions, and each executive will see the teams that agreed with them. The leadership team will not see the conflict at all, because the place it lands is two floors down, at five past nine, in the stomach of the person holding the card.

There is a practical consequence for anyone who writes a strategy. The test of a priority is not whether everyone in the leadership team can agree with it. It is whether the leadership team, asked what the priority means for a burst pipe on a Monday, gives the same answer. If eight executives give two answers, the card is not ready to leave the room.

If, then, on Monday

Psychology has a finding that bears directly on the card, and it is one of the better replicated results in the study of goals. In 1999 Peter Gollwitzer described what he called implementation intentions: plans that specify in advance when, where and how a goal will be acted on, in the form *if situation Y arises, then I will do X*.[7] A goal held as an intention, *I will put members first*, is often not acted on when the moment comes, because the moment does not announce itself. An if-then plan links the goal to the situation, so that the situation itself becomes the cue. In 2006 Gollwitzer and Paschal Sheeran gathered ninety-four independent

tests and found that forming implementation intentions had a positive effect on reaching goals of medium-to-large size.[8]

The research is about individuals and their own goals, mostly in studies of health, study habits and similar tasks, and it should not be stretched into a claim about organisations. But the mechanism translates cleanly. *Members first* is a goal intention. *If a member asks for a small claim to be settled the same day and the photographs show the damage clearly, then I settle it and note why* is an implementation intention. The second can be acted on at five past nine. The first can only be agreed with.

The house has written about how [an obstacle written down in advance arrives as an appointment rather than a verdict]({{BOOK:rsd-rsd-and-self-confidence}}), and the same holds at work. A strategy that has been turned into three or four if-then sentences for each team has had its conflicts settled before the morning they arrive. A strategy left as three good words has had its conflicts postponed to the moment they are hardest to settle well, by the person least able to see their consequences.

Santa Anna's canon describes what a phrase looks like when it does reach the floor, in a composite from its chapters on organisational soul. A research company had stopped saying the sentence its founders used, *for the patients we haven't met yet*, and when it came back, it came back not as a campaign. The canon is precise about the difference: it became "not a slogan, not a brand, but a living commitment that people used to orient their decisions". The test of a strategy on the floor is the same. It is whether anyone uses it to decide something.



The back-brief

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The back-brief

What changes this is modest, and it begins one level up. Picture the area manager who sits above the claims team leader and eight others like her. In the week after the cards arrive, she does one thing differently. Instead of a briefing, she asks for a back-brief, a practice Bungay describes from the military and which many firms already use under other names: each team leader writes, on a single page and in her own words, what the strategy asks of her team, and sends it back up.

The page has four short parts. What the strategy asks of this team, in a sentence a new starter would understand. The one or two decisions it changes, written as if-then sentences, using a real case from last month. What the team will stop doing, or do less of, because of it. And what the team leader needs from above to do it: an authority, a piece of information, a decision only someone else can make. The claims team leader writes that members first means the same-day settlement of clear, small claims, and that she needs to be told how large a claim she may settle without an adjuster, and that she cannot answer that herself.

The order of what happens next matters more than the page. The area manager reads all nine back-briefs before she meets anyone. She finds that four team leaders have read *members first* as settle-quickly, three as be-kind-on-the-phone, and two have not changed anything. That is not a failure of the team leaders. It is the most useful information the strategy has produced since it was launched, because it shows exactly where the card left a choice open. She takes the nine pages, unedited, to her own director, and asks the question none of them can answer: which priority governs when they conflict. Within the week the answer comes back down as two sentences, and each team leader rewrites her if-then lines against it.

The canon's chapter on the keystone effect describes the person the area manager has become, in a question it asks of every organisation: "Who translates executive decisions into meaning for the front line?" The answer in most firms is someone doing it informally, at the coffee machine, without authority. The back-brief makes the translation formal, visible and answerable. It turns the middle of the organisation from a relay into a place where the strategy is tested before it is spent.

There are failure modes, and they are predictable. A back-brief that is graded, praised or corrected for its wording teaches team leaders to write what the area manager wants to read. A back-brief that asks for something and receives no answer teaches them not to ask. And a back-brief demanded of team leaders by an area manager who has not written one herself, upward, about the strategy she received, is asking for a candour she has not shown. Chapter 7 carries the run sheet for this practice, and Chapter 6 places it in the order of a first ninety days. What can be said here is that the first round of back-briefs usually disagrees with itself, and that the disagreement is the point.

The next place the plan is lost is the person the area manager has just become, the manager in the middle who is handed a target and has to pass it on (Chapter 2), and further down the same road lies the number that starts to stand in for the purpose it was meant to serve (Chapter 3).

Writing the back-brief in your own building

The article this chapter began as ended at the team leader's desk. The book can go further, into the finer points a leader meets when she tries the back-brief in her own organisation, and the first of them is knowing whether her strategy has reached the floor at all.

There is a simple way to find out, and it needs no survey. Choose ten people, at least half of them within two levels of the work itself, and ask each one, privately and with no notice, one question: *what does the strategy ask you to do differently on Monday?* Write down the answers word for word. Most leaders who do this find three kinds of answer. Some people repeat the words on the card, accurately and without content. Some describe something their own manager has told them, which may or may not be the strategy. And a few describe a real choice they now make differently, in their own words, with an example. The proportion of the third kind is the nearest thing a leader has to a measure of whether her strategy has been deployed or only distributed. It is not a statistic and should not be reported as one; it is a reading, taken by hand, and it is usually sobering.

The second finer point is that the back-brief begins at the top, not in the middle. Before any team leader is asked to write one, the leadership team should be asked the question the claims team leader could not answer: for each priority, take one ordinary case from last month, and say what the priority means for it. If the leadership team gives two answers, the strategy is still a truce, and every back-brief written below it will expose the truce rather than resolve it. That is useful, but it is cheaper to find out in the boardroom. The practical rule is that no priority goes on a card until the people who wrote it have answered the same case the same way.

The third is what the back-brief page should and should not contain. It should contain the team's own words, a real case, an if-then sentence or two, what will stop, and what is needed from above. It should not contain a score, a plan with milestones or a request for budget, because each of those turns the page into a negotiation, and a negotiation is written for its reader rather than for its truth. A page of about two hundred words is enough. A page of two thousand has been written for the area manager.

The fourth is the reading. The person who receives the back-briefs reads all of them before replying to any, because the value is in the comparison. Four team leaders reading *members first* one way and three another is not nine opinions; it is one finding about the card. The reader sorts the pages by the choice each makes, notes where they agree and disagree, and takes the disagreements upward unedited, with the case attached. She answers every page within the week, even if the answer is only that the question has gone up and when it will come back.

The fifth is the stopping. Strategies are almost always written as additions, and the back-brief's line on what will stop is the one teams find hardest to fill in. It is also the line that most changes Monday. A team that has written *we will stop sending every water claim to the adjuster* has made the strategy real in a way that no amount of new activity can. If the line is empty on most pages, the strategy has asked for more without permitting less, and the people above should say what can be dropped before they ask for anything else.

The sixth is the leader's own back-brief. The area manager who asks nine team leaders to write one should write her own first, upward, to her director, about the strategy as she received it. It is the same principle Chapter 2 develops at length: the level above has to be willing to be caught out by a question it cannot an-

swer. A back-brief practice in which only the bottom writes is an inspection. One in which every level writes upward is a conversation about the strategy, held in writing, at the speed of a week.

And the decision that most changes the result is what happens to the first back-brief that disagrees with the strategy. If the team leader who writes that *members first* cannot be done without more authority is thanked, and given an answer, and sees the card's meaning change because of what she wrote, the second round of back-briefs will be candid. If she is told she has misunderstood the strategy, the second round will be accurate copies of the card. Chapter 6 places the back-brief in the first month of a ninety-day plan, after the leadership team has tested its own priorities, and Chapter 7 gives the floor reading, the truce test and the back-brief page as working pages.

Twenty to nine, a month later

It is twenty to nine on a Monday in the following month, and the card is still on the desk, a little curled at one corner. Under the three printed priorities, in pencil, the team leader has written two lines of her own. The first says which claims she settles on the day. The second says who she calls when she is not sure.

At five past nine the first claim comes up. A leaking roof, a photograph of a stained ceiling, a request to settle this week. She reads it once, checks it against the second line, and settles it before the tea has gone cold.

The card has not changed. It is still three good words on a postcard, and now it is a strategy.

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