

The Review That Reported Green

A review that asks whether the plan is on track learns only what it already knew.

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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 review that asks whether the plan is on track learns only what it already knew. It is two o'clock on a Tuesday, and the quarterly strategy review has reached slide four. The room is on the top floor of a firm that makes packaging for food, with a long window that looks over the car park toward the loading bays, and the afternoon light is coming in flat across the table. Slide four is the portfolio: fourteen strategic initiatives in a column, each with an owner's name and a coloured circle beside it. Twelve are green. Two are amber. There is no red, and there has not been a red on slide four for three quarters. The head of digital is fourth on the list, with the new customer ordering platform, and his circle is green. It is green because last month, with the agreement of the programme office, the milestones were moved. The platform is four months later than the plan the board approved in January, and it is on track against the plan as it now stands.

CHAPTER FOUR

The Review That Reported Green

A review that asks whether the plan is on track learns only what it already knew.



The Review That Reported Green

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

Two o'clock, slide four

It is two o'clock on a Tuesday, and the quarterly strategy review has reached slide four. The room is on the top floor of a firm that makes packaging for food, with a long window that looks over the car park toward the loading bays, and the afternoon light is coming in flat across the table. Slide four is the portfolio: fourteen strategic initiatives in a column, each with an owner's name and a coloured circle beside it. Twelve are green. Two are amber. There is no red, and there has not been a red on slide four for three quarters.

The head of digital is fourth on the list, with the new customer ordering platform, and his circle is green. It is green because last month, with the agreement of the programme office, the milestones were moved. The platform is four months later than the plan the board approved in January, and it is on track against the plan as it now stands. He is sitting with his hands flat on the table and a pen he is not using, and as the programme director thanks everyone for a strong quarter and turns to the two ambers, he feels the small, warm relief of a man who has not been asked, and under it something colder, because he knows the relief is the problem.

He is a composite, drawn from the way these reviews are described in the research below and in the house's own practice, and no firm is meant. Most people who have sat in a strategy review have watched slide four go by.

Ammanuel Santa Anna's canon lists the kinds of truth an organisation finds hardest to say, and the first kind it names is the easiest to describe and the most often withheld: "The project that's behind schedule but being reported as on track."[30] It is not describing a lie. The head of digital's circle is accurate. It is describing an instrument built to answer the wrong question.

This chapter makes one claim. A strategy is lost when its review asks whether the plan is being followed rather than what the plan has learned. The traffic light is a reasonable answer to the first question and no answer at all to the second, and an organisation that reviews its strategy by colour will learn, quarter after quarter, only what it already knew.

What the colour measures

A status colour measures one thing well: the distance between the work and the current version of the plan, as judged by the person responsible for the work. Each part of that sentence matters. The distance is to the current plan, not the original one, so a plan that is rewritten every month can stay green for a year. The judgement is made by the owner, who is also the person who will be asked to explain an amber. And the colour says nothing about why the distance is what it is, or whether the plan itself has turned out to be wrong.

The canon describes the result as a symptom of an organisation whose sensing has gone numb. Listing the signs of compromised feedback, it includes this one: "Feedback mechanisms exist (surveys, retrospectives, review processes) but are ritualistic — the data is collected but nothing changes." Slide four is not a failure of honesty. It is a ritual that has kept its form and lost its purpose. The fourteen circles are collected every quarter, and nothing in the strategy has changed because of them in a year.

The 2015 survey by Donald Sull, Rebecca Homkes and Charles Sull, published in the *Harvard Business Review*, named the belief underneath the ritual as one of its five myths of execution: that execution means sticking to the plan.[31] As the study is reported, a substantial share of managers named difficulty in adapt-

ing to changing circumstances as a cause of failed execution, and the firms that moved resources quickly when conditions changed did better than those that did not. The figures are survey results in a practitioner magazine and are taken here from summaries of the article, because the original was not reachable for this book. The direction of the argument is what matters, and it is not new. A plan is a set of predictions about what will work. A review that asks only whether the plan is being kept treats the predictions as settled.

The canon makes the same distinction in a sentence that could be pinned above slide four: "Execution assumes that the plan is correct and that the task is faithful implementation." The review is built for execution. It has no line on which to record that an assumption in January has turned out to be false.

Why green is safe

There is a reason the colours drift toward green, and it is not that owners are dishonest. It is that the review makes amber costly. An amber circle earns its owner the next twenty minutes of the meeting, in front of the executive team, explaining. A green one earns nothing at all. Over three quarters the room learns, without anyone deciding it, that the best way to protect an initiative is to keep it green and to manage the problems somewhere else.

Santa Anna's canon, in its chapter on accountability, describes the mechanism with unusual directness:

> *Accountability, in its conventional organizational incarnation, is a mechanism of retrospective judgment. It looks backward. It identifies fault. It administers consequences. Its emotional signature is fear — the chronic, low-grade anxiety that pervades organizations where people know that their mistakes will be noticed, named, and penalized.*

It then names the consequence that slide four exhibits: "When people are afraid of being held accountable, they hide their mistakes rather than surfacing them early when they can still be corrected." The head of digital's four months were visible in March as a slipping dependency on a supplier's system. In March they were cheap. By the time a later review is forced to colour the platform amber, they will be expensive, and the conversation will be about him rather than about the supplier.

The house has written about [the meeting after the meeting]({{BOOK:orgdev-flow}}), where the doubt a room will not voice at the table is spoken in the lift afterwards. Slide four is the same pattern written into an instrument. The doubt is not even voiced in the lift. It has been absorbed into a rescheduled milestone, and the colour reports the absorption as success.



The questions an army asks

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

The questions an army asks

There is a long-standing practice built for the opposite purpose, and its best-known version comes from the United States Army. The after-action review, developed in the army's training centres from the 1970s onward and since adopted in many hospitals, airlines and firms, asks four questions after any significant piece of work: what was supposed to happen; what actually happened; why there was a difference; and what will be done differently next time.[32] It is held soon after the event, by the people who did the work, and its rule is that it is for learning, not for blame. Practitioners who have written about it, among them

Marilyn Darling and Charles Parry in 2001, describe it as a way of linking reflection directly to the next plan.[33] Those accounts are practitioner writing and should be read as descriptions of the practice, not as evidence of its effect.

The evidence for the effect comes from elsewhere. In 2013 Scott Tannenbaum and Christopher Cerasoli published a meta-analysis of debriefs, the general family to which the after-action review belongs, gathering forty-six samples with more than two thousand participants.[34] On average, debriefs improved effectiveness over control groups by about a quarter, an effect size the authors reported as d = .67, and the effect was similar for teams and individuals, in simulated and real settings, in medical and non-medical work. They also found that debriefs worked better when participants, focus and measures were aligned, and when the debrief had structure and facilitation. The studies are mostly of training and of discrete tasks, not of strategies running over a year, and that limit should be held in mind. What the finding supports is narrower and still useful: a structured conversation about what was expected and what happened makes the next attempt better, by a margin large enough to notice.

One study in that family bears directly on slide four, because slide four only ever discusses its ambers. In 2005 Shmuel Ellis and Inbar Davidi ran a field experiment with soldiers on successive navigation exercises.[35] Soldiers debriefed on both their failures and their successes after each day improved significantly more than soldiers who reviewed only their failures. Before the experiment, the soldiers' understanding of their failed events was richer than their understanding of their successful ones; reviewing the successes closed the gap. A green initiative, in other words, is a lesson the organisation has not learned yet, because nobody has asked why it went well, or whether it really did.

The house has written about how [the order of the questions in a weekly review decides what the review teaches]({{BOOK:rsd-rsd-and-self-confidence}}). The quarterly review is the same instrument at the scale of a firm, and its order teaches the same thing.

Check, then act

The quality movement that gave the world hoshin kanri had its own word for what slide four leaves out, and it sits in the middle of the cycle most managers learned early: plan, do, check, act. The cycle is usually traced to Walter Shewhart's work on statistical control at Bell Laboratories in the 1920s and 1930s and to W. Edwards Deming, who carried it to Japan after the war; that lineage is the standard account and is summarised here, not reopened.[36] What matters for the review is the order of the last two words. The check is not a verdict on the people who did the work. It is a comparison of what the plan predicted with what happened, made so that the next action is better than the last.

When Barry Witcher and Rosie Butterworth studied hoshin kanri in three Japanese-owned manufacturing subsidiaries in Britain, they found it was driven by a process of review, and that administering the periodic review was one of its main practical difficulties.[37] The finding is from case studies in three firms, and it is

not a measurement of effect. But it locates the weak point exactly where slide four sits. A firm can deploy its objectives with great care, through every level, and still lose them in a review that only asks whether each level is on schedule.

The canon describes what a strategic initiative looks like when it is held in the spirit of the check rather than the verdict. Writing about governance in a world that cannot be fully predicted, it says that experiments should be designed with intention, with hypotheses, measures, time horizons and criteria for stopping. "But they are held *as experiments* — not as commitments carved in stone." An initiative on slide four is a commitment carved in stone. Its owner can only report that the stone is still standing, or move the stone.

The difference is not academic for the head of digital. If his platform were held as an experiment, its January plan would have said what the firm believed: that customers would order online once the platform existed, that the supplier's system would connect without trouble, and that the sales team could change shape by the winter. Each belief would have had a date by which it could be checked. In March, the second belief would have failed its check, and the review would have had something to learn. Instead it had a colour.

What the review never sees

There is a further cost, and it is the one that most directly separates the strategy from the floor. A review of fourteen initiatives by colour sees the initiatives. It does not see the assumptions that connect them to the strategy, and it does not see the work below them. When the customer ordering platform is late, the strategy assumed that customers would order online by the autumn and that the sales team could be smaller by the winter. Neither assumption appears on slide four. The sales team has already been told.

The canon describes the alternative in its chapter on commitments, as a promise built into every commitment from the start: "*I commit to communicating honestly about my progress, including when I am falling behind, encountering obstacles, or realizing that the commitment needs to be renegotiated.*" It adds the reason that promise is worth more than any colour: "When the commitment to communicate is genuine, problems surface early — when they can still be addressed." A commitment to renegotiate is not a weakness in a plan. It is the plan's way of learning.

The gain here is easy to describe and almost never counted. Every assumption that fails in a strategy will be discovered eventually; the only question is when. Discovered in March, the platform's four months are a conversation with a supplier and a later date for the sales team. Discovered in October, they are a recovery: contractors kept on, customers given apologies, a sales team rebuilt. The difference between the two is a real cost that belongs to no line in any report, and it can be measured, from the firm's own project and cost records, in the way the house has described for [a number both sides can sign]({{BOOK:orgdev-flow}}).



Who chooses the colour

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

Who chooses the colour

There is a quieter question underneath slide four, and it decides more than any other: who chooses the colour. In most firms the answer is the owner of the initiative, sometimes moderated by the programme office. The owner is the person who will spend the next twenty minutes explaining an amber, and the programme office is measured, in part, by how many of its initiatives are green. Neither is dishonest. Both have reasons to prefer one colour.

Santa Anna's canon describes the general mechanism in a passage on information in hierarchies. Information travelling upward, it says, is at each layer "filtered, summarized, and edited — often unconsciously — to match what the next layer expects or wants to hear." A status colour is the most compressed summary an organisation produces: a whole quarter of work reduced to one of three words. The compression is useful. It also leaves no room for anything the next layer does not expect.

The remedy is not to distrust owners. It is to change who is in the room when the colour is chosen. A colour set by the owner together with the person nearest the work, the developer working on the supplier's interface, the planner who knows the delivery dates, carries information the owner alone cannot supply, and it is harder to round toward green, because two people have to agree on it. It also changes what the colour means to the person nearest the work. Instead of hearing about the strategy from slide four, months later, she has helped to write it.

There is one more rule that matters, and it is about timing. An amber reported early should cost its owner less than an amber reported late, and the firm should be able to show that it does. If the first early amber is met with twenty minutes of questions and the late one with twenty minutes of questions, the room will learn that timing makes no difference, and it will go on reporting late. If the early one is met with thanks and help, and the late one with the question *when did you first know*, the room will learn the difference in a quarter.

The learning review

Picture the next quarterly review, and a programme director who has decided to change one thing. She does not abolish slide four. She moves it. The colours go out in writing three days before the meeting, set not by each owner alone but by the owner together with the person nearest the work, and every owner is told, in writing and in advance, that an early amber will be thanked and never questioned on the day it appears.

The meeting itself is spent on three initiatives, not fourteen. She chooses them by what the room can learn, not by colour: one amber, one green that has moved its milestones, and one green that seems to be going well. For each, the owner answers the four questions of the after-action review in ten minutes: what the strategy expected by now, what has actually happened, why there is a difference, and what the owner would change. The head of digital, asked about his green platform, says that the strategy expected online ordering by the autumn and will not get it until the spring, and that the reason is a supplier's system nobody had tested, and that the sales team's plan should change. The room is quiet for a moment. Then the chief commercial officer asks the next question about the supplier, and not about him.

The last fifteen minutes are kept for one thing: what in the strategy itself changes because of what the room has just heard. Not the initiatives; the assumptions. The programme director writes them on a single page, each with an owner and a date, and the page goes to the board with the colours.

The canon describes reviews conducted in this spirit in a sentence that is also a standard: "These retrospectives, conducted with genuine curiosity and without self-congratulation, are among the most powerful developmental practices available to governance groups." The test of the standard is simple. After the review, has anything in the strategy changed, other than a date?

There are failure modes, and they are predictable. The programme director thanks the first early amber and then, in the next quarter, asks its owner why the problem was not foreseen. The three initiatives are always the troubled ones, so that being chosen becomes a sign of trouble. The page of changed assumptions is written and never read by the board. And the four questions are answered in the language of the slides, smoothly, because nobody has yet seen what happens to a candid answer. Chapter 7 carries the run sheet for this practice, and Chapter 6 places it in the order of a first ninety days.

The review is where the strategy's numbers are read, which is why a number set without its pair (Chapter 3) will mislead it, and it is also where the firm has its best chance to notice that the strategy it is actually following is not the one it wrote (Chapter 5).

Running the learning review

The article this chapter began as followed one quarterly review. The book can go further, into the finer points of changing an organisation's review rhythm, and the first of them is where to begin, because a quarterly review happens only four times a year and a first attempt should not wait three months.

The learning review is best begun in a monthly operating review, or in one division's review, before it reaches the quarterly strategy review. A monthly meeting gives three attempts in a quarter and a chance to make the mistakes in a smaller room. When the quarterly review changes, the people in it have already seen the four questions work, and the first candid answer at the top table is less of a risk because it is not the first anywhere.

The second finer point is the pre-read. The colours, the figures and the written updates go out at least three days before the meeting, and the meeting does not repeat them. A meeting that walks through the status slides again has spent its time on the part of the review that could have been read. The rule is that anyone who has not read the pre-read does not ask questions about it in the room; the room is for what cannot be read.

The third is choosing what to review. Three items are enough for an hour, chosen by what the room can learn, not by colour alone: usually one amber, one green that has moved its milestones or its scope, and one green that appears to be going well. The third is the one most often skipped and, on the evidence Ellis and Davidi gathered, one of the most valuable, because a success that nobody has examined is a lesson the organisation has not yet learned. The items should rotate, so that being chosen is ordinary rather than a sign of trouble.

The fourth is the four questions and what each is for. *What did the strategy expect by now?* is answered from the original plan, not the current one, because the point is to see what has been learned since January. *What has actually happened?* is answered in facts and dates. *Why is there a difference?* is where the time goes, and its answer should name an assumption, not a person. *What would you change?* asks the owner, first, before the room offers anything. Ten to fifteen minutes an item is usually enough. The chair's job is to keep the third question about the assumption and to stop the room from turning it into the question *who*.

The fifth is the colour rule. The colours are set by the owner together with the person nearest the work, and an early amber is thanked and never questioned on the day it appears. A late amber, one that appears after it could have been seen, is met with a single question asked without heat: *when did you first know?* Over two or three cycles the difference between those two receptions teaches the room more than any statement about candour could.

The sixth is the page that leaves the room. The last fifteen minutes of every review are kept for one thing: what in the strategy itself changes because of what was heard. Each change is written on a single page with an owner and a date, and the page goes to whoever owns the strategy, usually the board or the executive team. If the page is empty for two reviews running, either the strategy is perfect or the review is not yet real, and it is almost never the first.

And the decision that most changes the result is what happens to the first owner who answers the third question honestly about her own initiative. If the room moves to the assumption, the supplier's system, the forecast that was wrong, and the owner leaves the meeting with help, the practice will hold. If the room moves to the owner, the next review will be held in the old language, smoothly, and the four questions will become a ritual of their own. Chapter 6 places the learning review in the second half of a ninety-day plan, beginning in a monthly meeting, and Chapter 7 gives the pre-read rule, the choice of three, the four questions, the colour rule and the page of changed assumptions as a run sheet.

Two o'clock, the next quarter

It is two o'clock on a Tuesday, and the quarterly review has reached the part of the afternoon where slide four used to be. The colours went out on Friday and nobody has mentioned them. The light across the table is the same flat light from the long window, and the loading bays below are busy.

The head of digital is speaking about the supplier's system, which has now been tested, and about the spring. He has a pen in his hand this time, and he is writing on the page of changed assumptions as he talks.

On the screen behind him there is no slide at all, only the four questions and a blank space under the last one.

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