

THE STRATEGY THAT REACHES THE FLOOR · CHAPTER SEVEN

The Field Manual

Fifteen working pages, the readings, the run sheets, the pairs and the three answers, ready to carry into a room.

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THE LICENCE

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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.

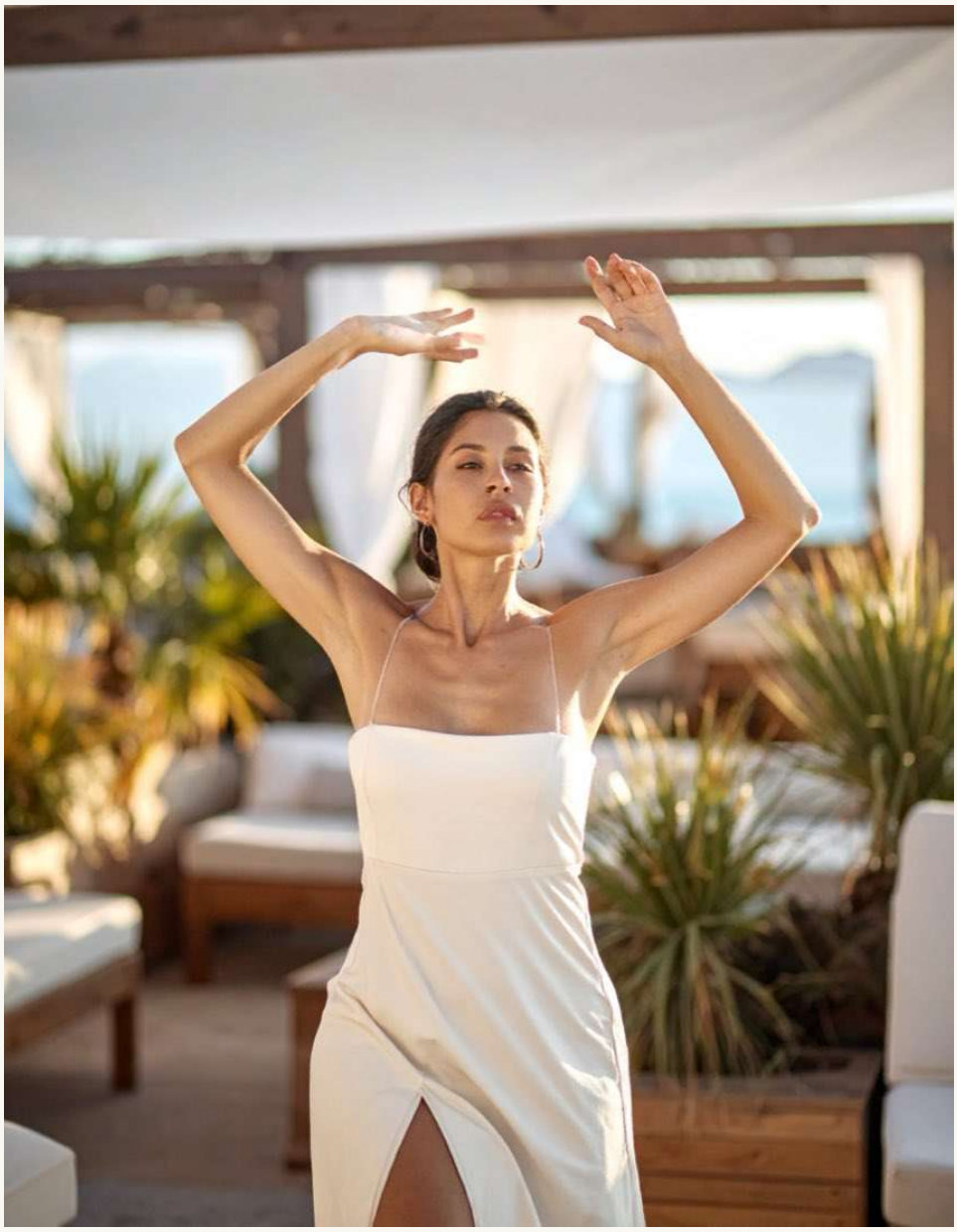
ABSTRACT

Fifteen working pages, the readings, the run sheets, the pairs and the three answers, ready to carry into a room. The chapters of this book describe five practices as people doing them. This chapter holds the working pages: the readings, the run sheets, the question sets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software. The pages follow the order of the first ninety days, not the order of the chapters. Each opens with a line saying where it comes from and when it is used. Where a page gives a script, the words are a starting point; say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

CHAPTER SEVEN

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How to use these pages

The chapters of this book describe five practices as people doing them.[46] This chapter holds the working pages: the readings, the run sheets, the question sets and the one-page templates that the earlier chapters point to and do not print. Each page is meant to be photocopied, filled in by hand and kept in a folder that the convenor of Chapter 6 looks after. Nothing here needs software.

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say them in your own voice. Where it gives a time, the time is a planning guide from practice, not a finding.

Two rules govern the whole manual. Write down what people said, not what you wish they had said. And answer everything you collect: a back-brief unanswered, a ball not caught, a pair never read, a page of changed assumptions that the leadership team never sees, teaches the opposite of what the practice is for.

What these pages do not contain is the design of any arrangement for sharing a gain: proportions, thresholds, timing or terms. Those belong to each organisation and the people it covers, and they are decided separately.

1 · The floor reading

From Chapter 1. Used in days one to ten, and again at day ninety.

Ask ten people, privately and without notice, at least half of them within two levels of the work: *What does the strategy ask you to do differently on Monday?* Write the answer word for word. Then tick one column.

PERSON (ROLE ONLY)	THEIR WORDS	CARD REPEATED	A MANAGER'S INSTRUCTION	A REAL CHOICE, WITH AN EXAMPLE

Reading it. Count the last column. It is a reading taken by hand, not a statistic, and it should not be reported as one. Keep the words; at day ninety, ask the same ten people the same question and lay the two pages side by side.

2 · The truce test

From Chapter 1. One meeting of the leadership team, about ninety minutes, in days one to ten.

For each priority on the card, the convenor brings one ordinary case from last month, from the floor reading where possible. Each executive writes privately, in two sentences, what the priority means for that case. Then the answers are read aloud together.

PRIORITY	THE CASE	ANSWERS THAT AGREE	ANSWERS THAT DIFFER, AND HOW

Reading it. Where the answers differ, the priority is still a truce. Do not resolve it in this meeting; write the difference down. The priority with the widest difference is the one to settle first (Chapter 6, days eleven to thirty).

Settling it. In a later meeting, with the case in front of the team, write two or three sentences: which good thing governs when the two conflict, and how much risk the firm will carry to honour it. Test the sentences on a second case before they leave the room.

3 · The back-brief page

From Chapter 1. Written by each manager two levels below the leadership team, for one settled priority, in days eleven to thirty. The sponsor writes hers first, upward.

Priority: Team: Written by: Date:

1. What this priority asks of my team, in a sentence a new starter would understand:
2. The one or two decisions it changes, as if-then sentences, each with a real case from last month:

- *If* _____ *then* _____
- *If* _____ *then* _____

1. What my team will stop doing, or do less of, because of it:
2. What I need from above to do it (an authority, a piece of information, a decision only someone else can make):

About two hundred words. No score, no milestones, no request for budget.

4 · Reading the back-briefs: run sheet

From Chapter 1. For the person who receives them.

Before replying to anyone. Read every page. Sort them by the choice each makes for the same kind of case.

THE CHOICE THE PAGE MAKES	PAGES (COUNT)	TEAMS

Within the week. Answer every page in writing, even if the answer is only that the question has gone up and when it will come back. Take the disagreements upward unedited, with their cases attached, and ask for the decision none of the writers can make.

Mistakes to watch for. Grading or correcting the wording. Answering the easy pages and leaving the awkward. Asking for back-briefs without writing your own. Treating the first page that disagrees as a misunderstanding.

Signs it is working. The second round of pages is less alike than the first round of the floor reading was, and more specific. The line on what will stop is filled in on most pages.



5 · Catchball: the three questions and the return

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5 · Catchball: the three questions and the return

From Chapter 2. Used in days twenty-one to forty-five, for the targets that serve the settled priority.

What goes down with each target. The target; the part of the strategy it serves, in a sentence; what the level above believes about how it could be reached.

The three questions, answered on one page by the level below, within a week.

1. What would it take to reach this target with what we have now?

2. What could we reach if one thing changed, and what is that thing?
3. What would reaching it cost elsewhere, in our own words?

The return. Keep the three apart.

What we commit to
What we could reach with a named decision from above (name it)
What we believe cannot be reached without a cost to something else the strategy values (name the cost)
What we compared with our peers before returning this

Before returning. The managers at the same level meet for an hour, without the person above them, to compare what they have heard.

6 · Catching the ball: questions for the level above

From Chapter 2. For the director who receives the returns.

Read every return before answering any. Then, for each target, ask:

- Do the returns say something about the strategy, not only about the number?
- Can the target and the strategy both be true? If not, which gives way?
- Do you genuinely have the capacity to fulfil this, and what would need to be true for it to be realistic?
- What are we willing to let go of to make space for it?
- What decision is ours to make, and by when?

Answer in the same form the return used: in writing, specific, within the week. Two rounds are enough for most targets and a third for one or two. More than three usually means the level above has not yet decided what it will let go of.

Mistakes to watch for. Restating the original target. Treating the returns as a negotiation over a shortfall. Running catchball only on targets already promised to the board.

7 · The pair page

From Chapter 3. Written for each key result on the day the target is agreed, in days thirty-one to sixty.

Purpose, in a sentence a new starter would understand
Key result
Kind (committed · aspirational · learning goal)

Paired measure: the number that would rise if the key result were met the wrong way
The record it comes from, and who keeps it
We will not …
Signed by, and date

Finding the second number. Ask: *if a sensible, tired person wanted to hit this number without doing what it is for, what would they do?* Then ask what record would show it. Common pairs, from Chapter 3:

FIRST NUMBER	A SECOND NUMBER THAT OFTEN EXPOSES IT
Handling or processing time	Repeat contacts about the same fault
Sales	Returns, discounts or cancellations the next quarter
Cost	Overtime, agency spending, faults found later and elsewhere
A delivery date	Rework after the date

Showing the pair. Both numbers, the same size, in the same place, every time either is shown.

8 · Choosing the kind of goal

From Chapter 3, after Seijts and Latham (2005) and the committed and aspirational results of Doerr (2018).

IF	THEN SET	AND REVIEW IT BY ASKING
The team knows how to do the work and the effort is what is missing	A committed result	Will we meet it, and if not, when did we first know?
The target is set high on purpose to stretch what seems possible	An aspirational result, said to be one	How far did we get, and what did we learn on the way?
The team does not yet know how to do the work well	A learning goal: find and write down a number of ways that work, by a date	Which ways did we find, and which will we keep?

The weekly review of the pair (ten minutes).

WEEK	FIRST NUMBER	SECOND NUMBER	DID THEY MOVE TOGETHER?	IF NOT, WHAT DO WE THINK IT MEANS?

Reading it. First up and second up together: probably a gain. First up, second worse: not yet a gain; find out why. First worse, second better: the team may have found something that matters more than the target. Watch especially the last weeks before a target is assessed, and the band just short of the line.

9 · The learning review: run sheet

From Chapter 4. Begun in one monthly operating review from day forty-one; the quarterly review adopts it later.

Three days before (pre-read). The colours and figures go out in writing. Colours are set by each owner together with the person nearest the work. Every owner is told, in writing, that an early amber will be thanked and never questioned on the day it appears. The meeting does not repeat the pre-read.

Choosing three (five minutes, by the chair, beforehand). One amber. One green that has moved its milestones or its scope. One green that seems to be going well. Rotate them, so that being chosen is ordinary.

For each of the three (ten to fifteen minutes). The owner answers, in order:

1. What did the strategy expect by now? (From the original plan, not the current one.)
2. What has actually happened? (Facts and dates.)
3. Why is there a difference? (Name an assumption, not a person.)
4. What would you change? (The owner answers first, before the room.)

The last fifteen minutes. What in the strategy itself changes because of what we heard? Write it on page 10.

Mistakes to watch for. Walking through the pre-read. Choosing only the troubled items. Letting question 3 become *who*. An empty page 10 for two reviews running.



10 · The colour rule and the page of changed assumptions

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10 · The colour rule and the page of changed assumptions

From Chapter 4.

The colour rule. Set by the owner and the person nearest the work together. An early amber: thanked, and helped. A late amber: one question, asked without heat, *when did you first know?* Never the same reception for both.

The page that leaves the room.

ASSUMPTION IN THE STRATEGY	WHAT WE NOW BELIEVE	WHAT CHANGES BECAUSE OF IT	OWNER	BY WHEN

The page goes to whoever owns the strategy, with the colours. If it is empty, write *nothing changed* and the date; two empty pages in a row mean the review is not yet real.

11 · The three lists and the realised-strategy page

From Chapter 5. Assembled for the previous quarter in days sixty-one to ninety, then every quarter.

The three lists. From records the organisation already keeps, sorted by two people who did not make the decisions.

PRIORITY ON THE SLIDE	MONEY APPROVED	NEW ROLES FILLED	LEADERSHIP HOURS (FROM CALENDARS)

None of these

The meeting (about two hours). Spend it only on the places where the lists and the slide disagree. For each, one answer on the record:

DIVERGENCE	ADOPT (THE PATTERN IS WISER; THE STRATEGY CHANGES)	STOP (THE PATTERN IS DRIFT; THE RULE CHANGES)	TEST (NOBODY KNOWS; DESIGN AN EXPERIMENT)	OWNER AND DATE

A test, on one line. We believe ; we will know by (date) because (measure); we will stop if .

Reading it. Over a year, a healthy team uses all three answers, and can point to one place where its written strategy changed because its realised one was wiser.

12 · Finding the unwritten rule

From Chapter 5. About an hour, before the meeting on page 11.

Take the last twenty approvals and the last twenty refusals or deferrals. Ask the people who decided them for the reason, as they remember it. Write the reasons in their words and count them.

THE REASON, IN THE DECIDER'S WORDS	TIMES GIVEN	SERVES WHICH PRIORITY?

Write the two or three most frequent reasons at the top of page 11, beside the strategy, in the same size of type. Then decide: keep the rule, change it, or write a second rule beside it for the part of the business it is starving.

13 · The ninety days on one page

From Chapter 6.

DAYS	PRACTICE	WHO	TIME IT TAKES	WHAT IT PRODUCES	EARLY SIGN IT IS GOING WRONG
1–10	Read: the floor reading, the truce test, the list of targets and reviews, and a dated copy of the history (pages 1 and 2)	Sponsor, convenor, finance	Sponsor about 5 hours a week; one 90-minute leadership meeting	A first-guess page	People asking what the new initiative is called
11–30	Settle one priority; the back-brief in one division (pages 2 to 4)	Leadership team; managers two levels down	One meeting to settle; a week to write; a week to answer	Settled sentences; pages with what will stop	The back-briefs are more alike than the floor reading
21–45	Catchball on that priority's targets (pages 5 and 6)	Director and the level below	A week a round; two rounds	Returned targets; decisions made above; costs named	No return names a cost elsewhere
31–60	The pair for each key result (pages 7 and 8)	Each team holding a key result	An hour to write; ten minutes a week	Pairs, with weeks of both numbers	The second number not looked at by week three
41–75	The learning review in one monthly meeting (pages 9 and 10)	Chair; owners; people nearest the work	About an hour, three times	Three pages of changed assumptions	Page 10 empty twice
61–90	The realised-strategy reading; the unwritten rule; one measurement conversation (pages 11 and 12; *Where the Flow Stops*, Chapter 7)	Working group; leadership team; finance	A day to assemble; a two-hour meeting; two 90-minute meetings to measure	Adopt, stop or test on the record; a signed measurement page	The calendars left out

14 · The day-ninety review

From Chapter 6. A meeting of the working group and the sponsor, about two hours.

Bring the first-guess page, both floor readings, the settled sentences and back-briefs, the returned balls and answers, the pairs, the three review pages, the realised-strategy page and the signed measurement page.

Ask, in order:

1. Where was the first guess right, and where was it wrong?
2. Does the floor now describe the settled priority as a choice, in its own words?
3. Which targets changed because a ball came back, and what did the level above have to decide?
4. Where did a pair separate, and what did the team learn?
5. Which assumptions changed in a review before they would otherwise have been found?
6. Where do the written and realised strategies still disagree, and what answer did each divergence receive?
7. Is there a gain both sides believe, and what does it show so far?
8. Who has started sending bad news early, and who has stopped?

What not to conclude. That the strategy has been deployed (ninety days show whether the practices are kept for one priority). That one month of a pair moving together is a gain. That an absence of findings means an absence of problems; look first at the answer given to the first back-brief that disagreed.

15 · The first Monday

From Chapter 6. For anyone who wants to begin with less.

- Ask three people within two levels of the floor what the strategy asks them to do differently on Monday. Write down exactly what they say.
- Take one priority and one ordinary case from last month. Write what you think the priority means for it, then ask one colleague on the leadership team to do the same without seeing yours.
- At your next review, ask the owner of one green item the four questions, and keep the last five minutes for what should change in the strategy.

The plan on your own floor

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

Luminous Prosperity Inc. takes this work into organisations as a gainshare. The flow is opened from the inside, with the people who already hold what the firm knows. The gain is counted from records the firm already keeps, against a measure both sides sign before anyone knows the answer, and the house is paid as a share of what is found: between thirty and ten per cent of it.

The book gives the card, the pairs and the three answers. How your own plan reads on a Monday morning, and what closing the distance would return, is read from your people and your records. That begins with a conversation.

REQUEST A CONVERSATION

References

1. Sources for this chapter: The sources behind these pages are given in full in the notes to Chapters 1 to 5: Sull, Homkes and Sull (2015), Kaplan and Norton (1996, 2004), Bungay (2011) and Gollwitzer (1999; with Sheeran, 2006) for pages 1 to 4; Guth and MacMillan (1986), Floyd and Wooldridge (1992, 1997), Westley (1990), Akao (1991), Witcher and Butterworth (2001) and Tennant and Roberts (2001) for pages 5 and 6; Locke and Latham (2002), Seijts and Latham (2005), Schweitzer, Ordóñez and Douma (2004), Bevan and Hood (2006), Grove (1983) and Doerr (2018) for pages 7 and 8; Tannenbaum and Cerasoli (2013), Ellis and Davidi (2005) and Darling and Parry (2001) for pages 9 and 10; Mintzberg (1978), Mintzberg and Waters (1985), Burgelman (1991, 1994) and Bower (1970) for pages 11 and 12; the measurement conversation is in Santa Anna, A. (2026), *Where the Flow Stops*; Santa Anna, A. *Conscious Governance Models*, "Movement 2: Commitment — Making Promises We Mean" (the capacity questions on page 6). The Luminous Developmental Canon; The times given are planning guides from practice, not findings of a study.

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