Essentials

Strategic Communication

SOS CONSULTING, LLC

Transforming small US Manufacturing workplaces into places that work for all to COMPETE today and tomorrow

Strategic Communication

Only when a cohesive leadership team has strategic clarity and alignment can there be effective communication. Without clarity and alignment, any communication, no matter how well structured or delivered, will create confusion and will not mobilize the workforce. People are skeptical about what they are told until they hear it consistently over time. Leaders must communicate strategic clarity over and over and over and over and over and over and over again; seven times. Employees wait to see how serious leaders really are about the message.

Messaging is not so much an intellectual process as an emotional one. The whole point of leadership is to mobilize the workforce around what is most important. Therefore, leaders must appeal to the head and the heart when communicating.

Communication is the real work of leadership.

- *Nitin Nohria*

It is important that key messages come from different sources and through various channels using a variety of tools. Today's technologies (email, teleconferencing and social media) can be useful. But effective communication has nothing to do with technology. The world is full of organizations in which employees feel uninformed despite access to newsletters, intranet sites, Facebook groups, and town halls; these methods lack interaction with the leaders, each other, and the message.

The most effective way to communicate is for members of the leadership team to come out of meetings with a clear message and promptly share with their direct reports and then have those direct reports do the same for their direct reports. This is called "cascading communication." When employees hear all leaders saying the same thing after a meeting, they start to believe that alignment and clarity exists. This will create momentum for action.

The process for accomplishing cascading communication starts at the end of a leadership meeting when the leaders agree on what they are going to go back and tell their people. This requires the leaders to review their decisions, decide which are ready to share, which are not and commit to the message and timing (within 24 hours is a good standard).

Face-to-face communication is best as it gives employees a chance to ask questions for clarification and to hear the tone and see the body language in which it is delivered. It is also best to communicate with the entire group so everyone hears the same message at the same time and can benefit from each other's questions.

The most important thing in communication is hearing what isn't said

- Peter Drucker

In summary, the three keys to effective cascading communication are:

1. Consistency of message from leader to leader
2. Timeliness of delivery
3. Face-to-face communication

Clear communication is crisp and structured. It is communication that provides enough information, but not too much; it is efficient. It is simple but addresses real-world complexities. Meandering, unfocused communication leaves people confused and questioning leadership. This means leaders need to share enough specifics to anticipate questions without overwhelming the hearer in details. A simple reason for a change should help people follow the logic and reach the same conclusion. Providing rationale is particularly important in times of uncertainty or large change. Speculation and gossip will occur if leaders do not step forward to offer clarity on the situation; people will fill in the gaps in communication, often with information that is far from the truth. When crafting communications, leaders should look at the situation from the listener's point of view and then monitor people's reaction for comprehension.

To listen well is as powerful a means of communication and influence as to talk well.
- John Marshall

Crafting a crisp structured message starts by identifying the "headline." This should be no more than 8 words. Next, nail down the talking points. Ask *"If people walk away with nothing else, what two or three points, do I want them to remember?"* Finally, once you have structured your message, refer back to it often and consistently. Repetition and familiarity will shape people's attitudes and feelings.

Everyone Needs to Know the Score

Leaders need to communicate in ways that stick. The old adage, "A picture is worth a thousand words" is really true. Simple tables, graphics, and drawings can be effective ways of painting a picture of the current situation or possible future. They can also help to weave information (facts/data) into a story.

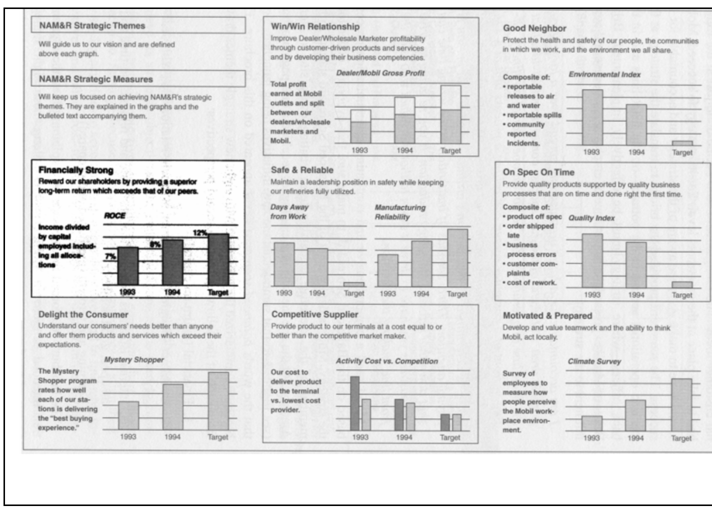
Scorecards and other visual management techniques help leaders and help team members manage and achieve performance results. They are timely, easy to understand, and often provide a graphical depiction of the performance of key performance indicators (KPIs) – like in sports, they let members of the team know if the organization is "winning" (achieving its targets for success). They help employees think and act like owners. Scorecards enable an organization to:

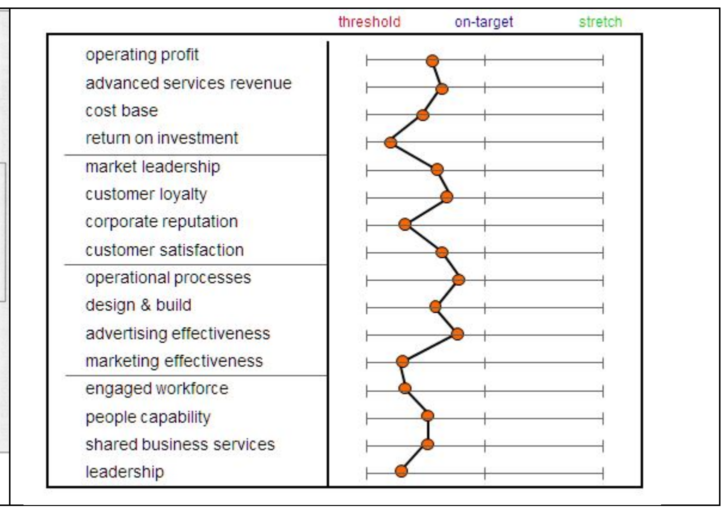
- Drive achievement toward goals;
- Focus on strategies;
- Align employee efforts toward common objectives;
- Improve performance;
- Guide shifts in direction; and
- Balance results across all stakeholder groups.

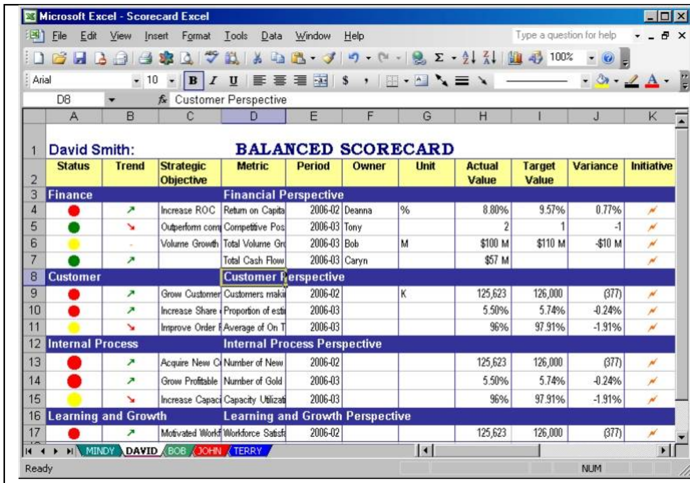
In their book, The *Balanced Scorecard*, Kaplan and Norton state that organizations can more effectively manage results with a balance of measures in four categories:

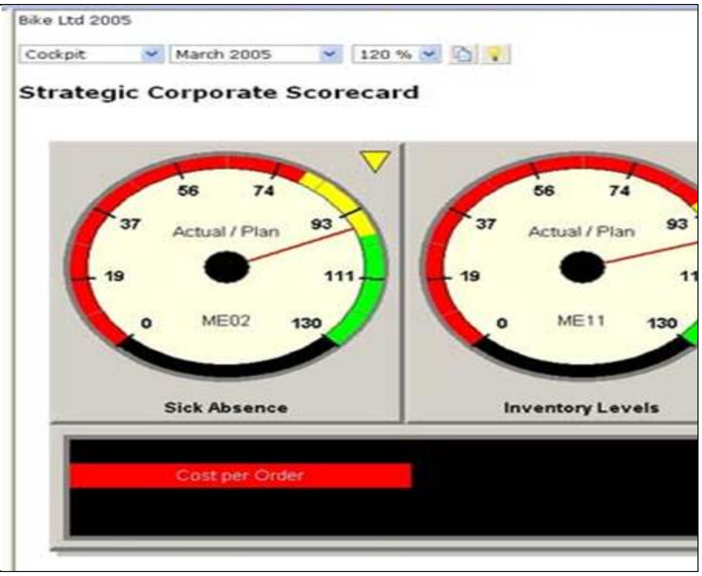
1) <u>Financial</u> – measures of the economic consequences of actions **already taken**; typically related to profitability (for example., operating income, return on capital, economic-value-added).
2) <u>Customer</u> – measures of the value proposition **already delivered** to targeted market segments (for example, customer satisfaction, customer retention, customer acquisition, customer loyalty, customer profitability, market share, specific customer drivers such as lead time and on-time delivery)
3) <u>Internal Process</u> – measures of the internal processes that **enable** the organization to deliver value proposition(s) that will attract and retain customers in targeted markets and satisfy shareholder expectations (for example, quality and time-based metrics, new product development)
4) <u>Learning and Growth</u> – measures of the organization's infrastructure that **enable** long-term growth and improvement.   These measures come from three sources: people (employee satisfaction, employee retention, employee training & development), systems (real-time availability of accurate data at point of use) and organizational procedures (rates of improvement in critical customer-based processes).

A balanced scorecard may take various formats from tabular to graphical, computerized to manually maintained white boards:









In its simplest terms, the balanced scorecard is a set of measures (scores) that translate the organization’s strategies and goals into a comprehensive set of measures that provides a strategic framework for communicating clarity and driving alignment across the organization. There is usually a hierarchy of scorecards. The scorecards are linked vertically and horizontally to each other. Vertical linkages connect the individual work team scorecard to organizational strategy and top-level goals; it helps work teams focus on strategic priorities and the organization’s vision. Horizontal linkages connect customer’s needs to process measures across work teams.

Historically, organizations have measured and communicated performance financially; this approach focuses on improving cost, quality and time of existing processes. The financial reporting process, however, is anchored in an accounting model that does not include the intangible and intellectual assets of an organization. These assets and capabilities are critical for success in today’s competitive environment.

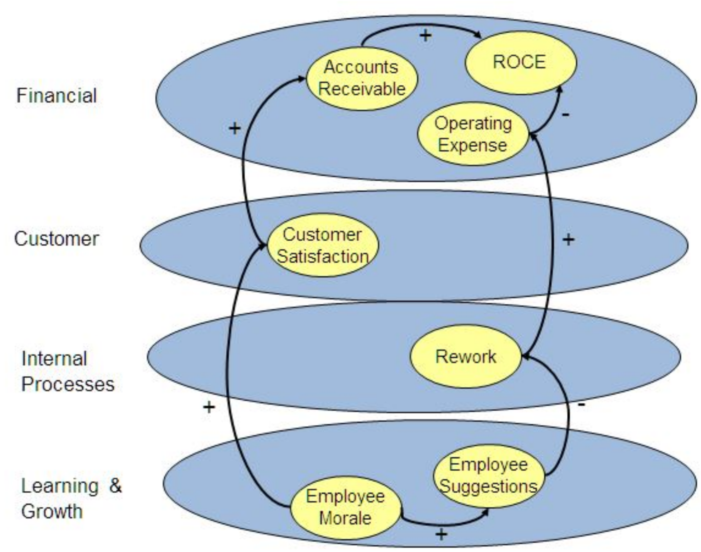
The objectives and measures of a balanced scorecard are more than a collection of financial and non-financial performance measures. The measures represent a balance between external measures related to shareholders and customers and internal measures of critical processes, innovation, and learning and growth; they are balanced between outcome measures, or results of past efforts, and the process and infrastructure measures that enable future performance.

World-class organizations use the balanced scorecard as a strategic management system consisting of four steps:

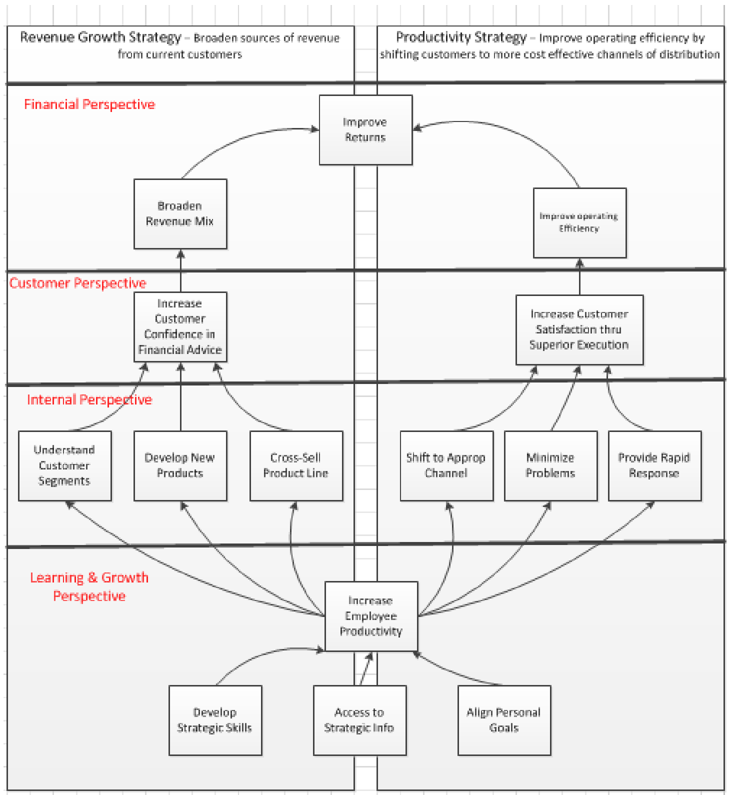
1) Clarify and translate vision and strategy (Essential #2, Clarity)
2) Link strategic objectives and measures (Essential #2, Clarity)
3) Plan, set targets and align strategic initiatives (Essential #2, Clarity)
4) Feedback and learning

1. Clarify and Translate Vision and Strategy
   As we have discussed previously, the senior leadership team must first clarify and be in alignment on the mission, vision, values, and objectives of the organization (Essential #2, Clarity). From a financial perspective, the team must agree on whether to emphasize revenue, market growth, profitability or cash flow generation. From a customer perspective, the team must be explicit about the customer and market segments in which it will compete. This requires a cohesive leadership team, one that trusts one another, can constructively debate the options, commit to a decision, and hold one another accountable to action (Essential #1, Cohesive Leadership). Without this type of clarity and alignment, each senior leader may have a different definition of superior customer service, making development and use of a balanced scorecard challenging and useless. Such clarity on vision, strategy and measurement will highlight those processes that are critical for achieving breakthrough performance for customers and shareholders, which often involve investment in employee skills, information technology and new procedures, which are difficult to justify with a traditional financial approach.

2. Link Strategic Objectives and Measures
   The best scorecards consist of a linked set of objectives and measures that are both consistent and mutually reinforcing. They include cause and effect relationships and a mixture of outcome and performance drivers (result measures and process measures). Outcome measures alone do little to communicate how the outcomes are to be achieved. Conversely, performance drivers without outcome measures will not reveal whether operational improvements have been translated into enhance customer and financial performance. Strategy maps are particularly useful in identifying these relationships. A simple map depicting the relationships between strategies in the four categories is shown below:



Of course, most strategy maps are more complex and contain multiple strategies for each category. For example, the complex strategy map for Metro Bank as presented in Kaplan & Norton's *The Strategy Focused Organization* (2001):

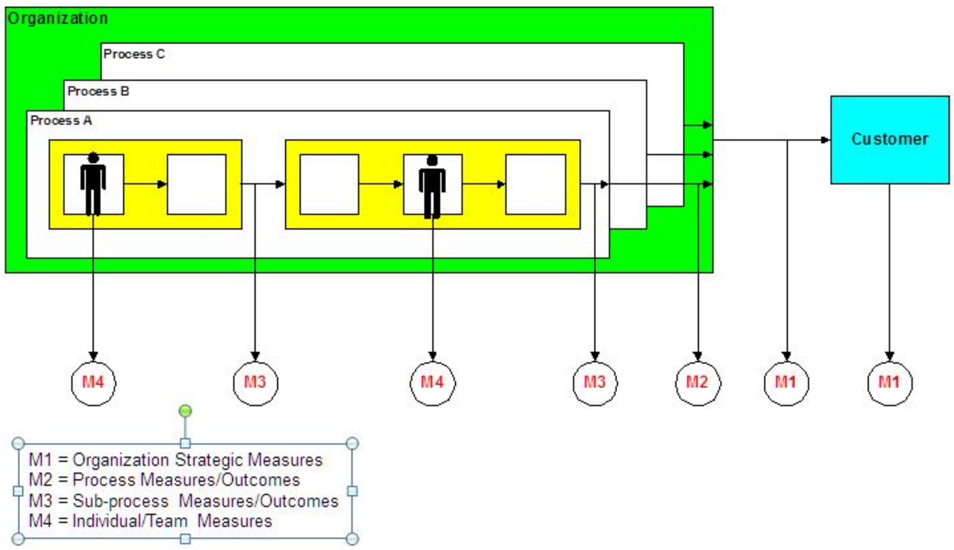


This translated into the following strategic scorecard:

Strategic Objectives	Strategic Measures	
	Lagging Indicators	Leading Indicators
Financial F1- Improve Returns F2 – Broaden Revenue Mix F3 – Reduce Cost Structure	 Return on Investment Revenue Growth Deposit Service Cost Change	 Revenue Mix
C1 – Increase Customer Satisfaction re: Products & People C2 – Increase Satisfaction "After the Sale"	Share of Segment Customer Retention	Depth of Relationship Satisfaction Survey
I1 – Understand Customers I2 – Create Innovative Products I3 – Cross-Sell Products I4 – Shift Customers to Cost-Effective Channels I5 – Minimize Operational Problems I6 – Responsive Service	 New Product Revenue Cross-Sell Ratio Channel Mix Change Service Error Rate Request Fulfillment Time	 Product Development Cycle Time Hours F2F with Customers
L1 – Develop Strategic Skills		Strategic Job Coverage Ratio

L2 – provide Strategic Information L3 – Align Personal Goals	 Employee Satisfaction Revenue per Employee	Strategic Information Availability Ratio Personal Goals Alignment (%)

This begs the question: How many metrics should a scorecard contain? Of course, the answer will depend on the size of the organization and its strategic objectives. Still, no single scorecard should contain more than twenty measures – it is just not manageable for a leader to understand and take action on more than twenty. Therefore, measures should be split between different levels of the organization. There is a natural hierarchy to measures that can be used to cascade the scorecard to individuals and work teams throughout the organization:



The scorecard for each level should be appropriate for the scope and responsibility of the leaders/teams of the level. By appropriate, the scorecard should help the leaders/teams answer and **take action** on key questions within their control:

- What does it cost to operate at this level?
- What revenues and profits are generated at this level?
- How long does it take to perform/service the task at this level?
- How much work is completed at this level?
- How many resources are used to perform at this level?
- How many defects/errors are generated at this level?
- How satisfied are the customers with the output? Note: this may apply to internal customers (versus external customers) at lower levels of the organization

3. Plan, Set Targets and Align Strategic Initiatives
   Leaders should set ambitious targets for the balanced scorecard measures that all employees can accept and buy into. Benchmarking best-in-class performers is a good way to understand what is possible. The strategy map can help identify the critical drivers

that will create breakthrough performance on important financial and customer measures. The gaps between targets and current performance should be used to set priorities for capital investment and improvement initiatives intended to close those gaps. When the scorecard is used to drive transformation, the organization can focus on the issues that create growth, not just those that reduce cost and increase internal efficiencies. The relationships between strategic objectives, and improvement projects can easily be communicated using a Goal Treelike that shown on page 9.

4. Feedback and Learning

   A planned strategy, though initiated with the best information available at the time, may no longer be appropriate given the current situation. There is also the need, on occasion, to devise new strategies to capitalize on new opportunities or to counter new threats. In short, leaders need to routinely questions their assumptions and reflect on past decisions.

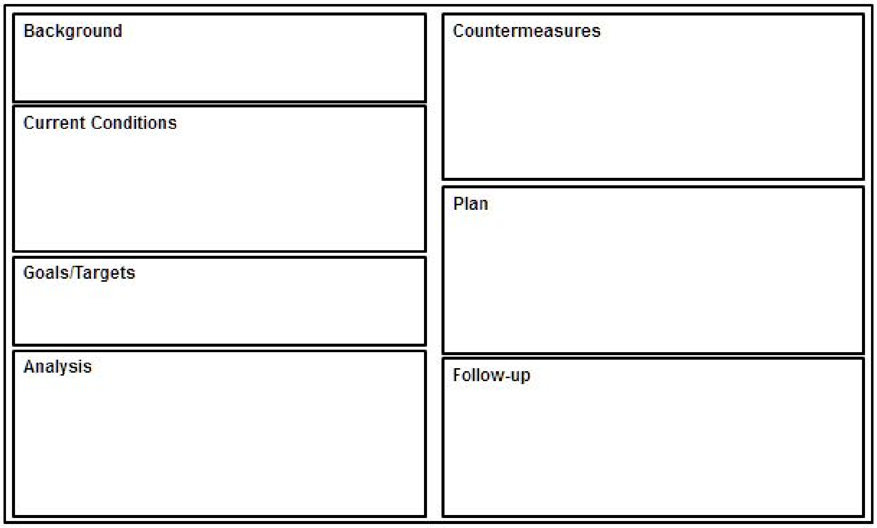
   This requires a feedback and problem-solving process that collects performance data about strategy and allows hypotheses about the interrelationships between strategies, measures, and initiatives to be tested. A formal strategic review should be conducted at least quarterly. The review is a separate meeting from operational performance reviews that assess whether recent performance is consistent with the short-term operating plan. In contrast, the strategic review focuses on trends, drivers, and correlations of results over the long-term. The goal of the strategic review is to refine strategy and implementation.

Invariably, data is not available for 20% of the measures, especially with respect to employee development and reskilling. This reveals a problem: "If you cannot measure it, you cannot manage it." If the data do not exist, progress on the associated strategic objective is likely to be inadequate or nonexistent. This should not be used as an excuse to only use measures for which data is currently available. Leaders should identify the measure that best provides insight into performance on which they can take action and obtain the data. Data is more easily available than ever using current sensor technology.

Other visual tools should be used in a work area to create a visual workplace that is self-explaining, self-ordering, and self-improving – in other words, an unusual, out of standard situation that could negatively impact strategic goals is immediately obvious for the local work team to correct. Wall schedules, tool boards, control charts, and flashing lights are examples of visual signals and controls that can be put in place and aligned with the strategic scorecard.

A visual tool often used in Lean Manufacturing is A3. A3 is a simple communication tool that uses an A3 size piece of paper (roughly 11"x17"). It is a standard methodology for innovating, planning, and problem-solving that is deeply rooted in operational learning. The standard format of A3 is shown below. Background and Current Conditions define the problem; Goals/Target defines the desired state or outcome; Analysis is all about finding the root cause.

Countermeasures are proposed actions to move to desired outcome while Plan are the specific actions to implement the countermeasures, including who will do what, when. Follow-up involves monitoring of the plans and results after completion. The A3 is posted in a convenient location for all stakeholders to read and comment, facilitating both communication and learning.



There are many different ways to communicate an organization's vision, mission, values, strategic objectives and "score" or progress on achieving those objectives. Every organization should have communication mechanisms embedded at all levels and functions of the organization, including scorecards, Goal Trees, and A3 to clarify the organization's strategic decisions so employees at all levels know exactly what they should do in their daily work to make the organization successful and know if they are winning the game of business (the score).

Using Stories for Strategic Communication

In most organizations, few employees have the analytical skills to critically look at the data they have at heir fingertips, let alone use it for good decision-making. Only 30% of employees are informed skeptics.

Few organizations have addressed how to effectively share knowledge/data/information among employees; workers often have insufficient knowledge to make key decisions and take effective action for improved productivity.

> Without…[developing]… a cohesive, dedicated and informed staff… businesses can easily become the equivalent of dinosaurs – stuck in the mud, doomed to extinction.
>
> - Lori Silverman in Wake Me Up When the Data is Over

Given that a satisfied and engaged workforce is a significant factor in productivity, it is all the more important that organizations find ways to communicate organizational information/knowledge that gives workers what they need to make and be engaged in key decisions and actions that improve and sustain the organization's profitability. How do this if 62% of employees are unquestioning empiricists or visceral decision-makers

Enter stories. Facts inform but stories resonate. Strategy, culture and systems do not change behavior in the same way stories do.

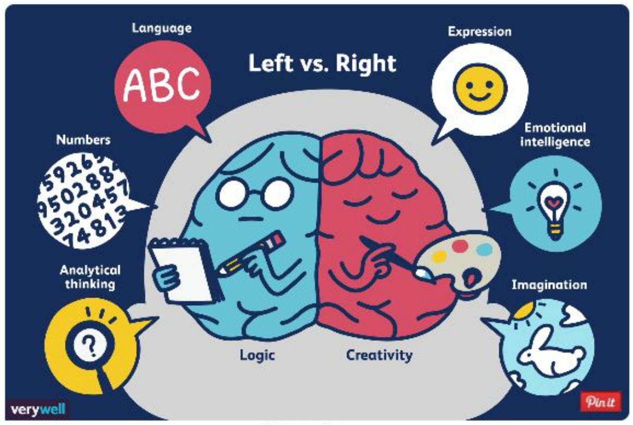
People will remember stories long after they've forgotten the facts.

- Sharon Love, owner, Incredible Pets

Stories are the most ancient forms of communication. Prehistoric people conveyed stories with drawings on stone walls, Egyptians told stories with hieroglyphics. Jesus used parables to change people's thinking and beliefs, redirecting lives. The use of stories in today's businesses, non-profit organizations and government is only just being recognized as a way to engage people in the organization's mission.

Stores of our lives form the basis of all we are and do. Lest leaders think this is all fluff, stories and storytelling have bottom-line impact. Stories can convey tribal knowledge, demonstrate the value of specific initiatives and of the organization to its customers and community. Stories which envision the future build trust, enable mutual respect and have the power to reframe perspectives and create alignment. All of these benefits positively engage workers which in turn increases productivity and profitability. When organization provide customers with something to talk about, they will talk about it, positive or negative. Positive stories will attract more business; this is the ripple effect stories have on organization's profitability. Organizations that use stories as part of their sales process crate two powerful advantages: they better understand their customer needs by listening to their stories, and they build trust, an essential ingredient to a long-term customer relationship. One hospital that captures and shares patient stories sends the message that patients are valued. Sharing patient stories also provides ordinary people a way to give back to the hospital staff that helped them heal while providing hope to others.

The key to telling good stories in organizations is to integrate right-brain imagination with left-brain analytical thought. Those that lean how to do this through the power of story are the most likely to succeed.



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The challenge is getting employees to come forward with their stories. Assume employees are already telling stories (at the lunch table, in the copier room). Train managers/supervisors to be on the lookout for them. Sharee stories about outstanding service during training, starting with orientation. Identify the key learning points and values you want to highlight and then search for stories that reinforce them. Be intentional about finding such stories. Sponsor contests to share best stories then publish and broadly share them. Regular encouragement and recognition can help. Lands' End has implemented a Legendary Customer Service Award to draw out employee stories.

There is an art to telling stories that have impact. Success requires a good story and someone comfortable telling it. According to Doug Stevenson, creator of the Story Theatre Method, great stories make great theatre. Story comes alive when we move around. Acting implies action. Good storytelling features both physical and emotional movement. Spicing up a story with acting techniques helps your audience SEE what you are saying.

If you want to inspire and stir your audience to action, you don't do it by standing in one place.

- Doug Stevenson

Key to acting out any story is to be authentic – remain true to yourself; bring yourself to the platform. You are the vehicle through which information is being transmitted. If you are not comfortable with yourself, transmission of the message will not be strong. Inexperienced storytellers spend a disproportionate time on content, not enough on delivery.

You don't have to be a good actor to tell a good story.

How to Tell a Good Story
First choose the right story – one that:
1) includes vivid details,
2) includes a lesson learned,
3) can use in a business context,
4) will call people to a higher standard

5) you enjoy telling

The story does not have to be personal. You can use current events, inspirational historical individuals, TV shows, movies. Good stories often involve a 'turning point' – a time when someone made a change in their life – geography, relationship, job. career, responsibility, perspective, accomplishment, or tragedy/injury.

The story must be congruent with the point you want to make and be relevant to the audience. This may take some imagination. As long as you stick to the facts, the essence of the event/situation/obstacle and the process used to overcome the obstacle and lesson learned, it is ok to embellish details – timelines, location, character names and character descriptions.

Once you have chosen the right story, craft the story. Crafting a good story takes time and multiple drafts. Doug Stevenson suggest you sue the first draft to remember the story, use the second to structure the story using the 9 steps below, the third to embellish the story with juicy details and the fourth to polish the story.

The 9 steps to structuring a good story are:

1) Set the stage/scene – create context; frame the story to help audience know where you are starting
2) Introduce the characters - use physical and emotional descriptions
3) Begin the journey – leave the safety and comfort of the initial scene
4) Encounter obstacle – a person, decision, physical or emotional problem; this is the most dramatic part of the story. Help your audience experience it.
5) Overcome the obstacle- plant the seed for the lesson to be learned
6) Resolve the story –; the let audience know how everything turned out; tie up loose ends, leaving no unanswered questions
7) Make the point - share the lesson learned
8) Ask the question – engage the audience in their experience with something similar
9) Restate the point – summarize the story and call your audience to action

Audiences will seldom take away more than one or two ideas from your story. People remember what hits home for them, not necessarily the point you wanted them to take home. If you wan your story to accomplish a specific purpose for employees to buy into new technology to embrace a new way of work, you need a Phrase that Sticks – something memorable. Doug Stevenson suggests ten ways to make it memorable:

1) Summarizes the point of the stories
2) Use only one phase per story
3) Make it short and sweet
4) Make it musical and rhythmic
5) Use word organic to the story
6) Use words that repeat the initial consonant sound
7) Use rhyming words
8) Turn it into a call to action
9) Use words that end in a consonant

10) Make it memorable by saying it repeatedly during your story.

Six Stories You Need to Know How to Tell
Annette Simmons in The Story Factor identifies six stories you need to know how to tell:

1) Who Am I? This story allows others to see you 'walk the talk' before they have an opportunity to work with you and serves to establish trust
2) Why Am I Here? This story reveals enough for people to make a distinction between healthy ambition and dishonest exploitation.
3) Vision Story This story connects people to a promised tomorrow in a way that shrinks today's frustration.
4) Teaching Stories These stories allow you to deal with complexity by helping people make sense of new information/skills in new ways. Can also demonstrate your values.
5) Values in Action. These stories provide an example of what the value looks like in daily use.
6) I know What you Are Thinking These stories disarm objections to the information/proposal you are sharing; serves to neutralize concerns without direct confrontation.

No communication, no story, no matter how well structured or delivered, will mobilize the workforce without clarity and alignment (Essential #2). That is why the SOS believes to Compete Today and Tomorrow, starts with building a cohesive leadership team (Essential #1) that is aligned on the six critical questions of the organization. People are skeptical about what they are told until they hear it consistently over time. Leaders must communicate strategic clarity (Essential # 3) over and over and over and over and over and over and over again; seven times. Employees wait to see how serious leaders really are about the message. A strategic story with a memorable phrase that sticks related to that clarity will appeal to the head and the heart of the workforce and inspire action faster than a PowerPoint presentation or poster.

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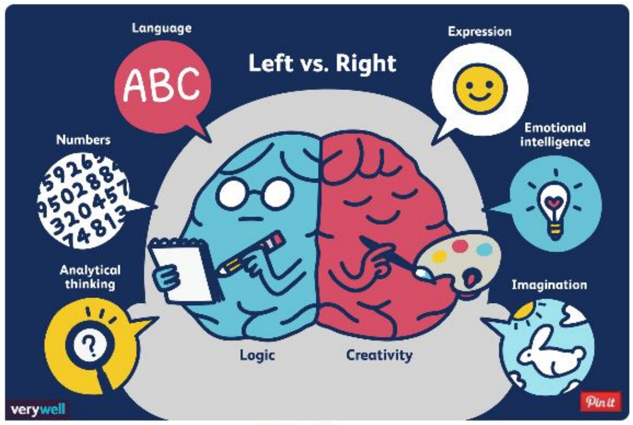

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Six Stories You Need to Know How to Tell

Annette Simmons in The Story Factor identifies six stories you need to know how to tell:

7) Who Am I? This story allows others to see you 'walk the talk' before they have an opportunity to work with you and serves to establish trust
8) Why Am I Here? This story reveals enough for people to make a distinction between healthy ambition and dishonest exploitation.
9) Vision Story This story connects people to a promised tomorrow in a way that shrinks today's frustration.
10) Teaching Stories These stories allow you to deal with complexity by helping people make sense of new information/skills in new ways. Can also demonstrate your values.
11) Values in Action. These stories provide an example of what the value looks like in daily use.
12) I know What you Are Thinking These stories disarm objections to the information/proposal you are sharing; serves to neutralize concerns without direct confrontation.

No communication, no story, no matter how well structured or delivered, will mobilize the workforce without clarity and alignment (Essential #2). That is why the SOS believes to Compete Today and Tomorrow, starts with building a cohesive leadership team (Essential #1) that is aligned on the six critical questions of the organization. People are skeptical about what they are told until they hear it consistently over time. Leaders must communicate strategic clarity (Essential # 3) over and over and over and over and over and over and over again; seven times. Employees wait to see how serious leaders really are about the message. A strategic story with a memorable phrase that sticks related to that clarity will appeal to the head and the heart of the workforce and inspire action faster than a PowerPoint presentation or poster. Contact SOS to learn more.

Communication is the real work of leadership.

- Nitin Nohria

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