

The graphic is a promotional banner for a webinar. On the left, a large teal circle contains the text "[GP] BUSINESS WEBINAR" in bold black letters, followed by "THURSDAY SEPTEMBER 26 11.00 AM EST" in white text on a white rounded rectangle. Below this circle is a circular portrait of Gina Paoloni, a woman with blonde hair, smiling. To her right is a black rounded rectangle with "Gina Paoloni" in white, and below that, another black rounded rectangle with "Moderator" in teal. On the right side of the banner, the text "WIN THE YEAR" is in large white letters, with "Finish Q4 strong and set the stage for success IN 2025" below it. Below the text is a circular portrait of Anthony Taylor, a man with a beard and dark hair, wearing a suit. To his right is the "SME STRATEGY" logo, which consists of the letters "SME" in a large font above the word "STRATEGY" in a smaller font, both in white on a black rounded rectangle. Below the portrait of Anthony Taylor is a black rounded rectangle with "Anthony Taylor" in white, and below that, another black rounded rectangle with "SME Strategy" in teal.

## Transcript

Speaker 1

Welcoming Anthony Taylor from SMA strategy consulting. Very excited to have you here today and you know maybe you can start Anthony just by, I don't know just give a little bit of a background about yourself and how you started your company, how you got involved with you know strategic planning facilitation. Be a month.

Speaker 2

Yeah, absolutely. Well, thanks, Gina, for having me. Thanks everybody for being here. So SMB strategy founded 13 years ago, a couple kind of short and long story of it is I was involved on a not-for-profit board that we were working in the downtown east side. It's a really kind of tough part of our city and I really wanted to have a lot of impact. With these folks at the same time I was running 2 coffee shops in an ESL school with a business partner, the. Non profit. Everybody was chaos. We everybody had good intentions, but it wasn't getting anything done. I'm on the for profit side, my business partner embezzled \$100,000 from me. And so and at that time of my life I found strategic planning as a tool to help align and organize the nonprofit.

Speaker

Gosh.

Speaker 2

And then to help mitigate risk for the for profit, so that stuff wouldn't happen. And then so I was doing marketing plans, business plans and then evolved into. To facilitating off sites for companies, I'll call it big and small, but a lot starting to get into that well, SME small to medium enterprise space across Canada and the US and then one of my colleagues just came back from Paris working with a multinational over there. So we've got a couple of international clients as well.

Speaker 1

Very cool. Nice. Thank you. So.

Speaker

Well, I'd love.

Speaker 1

To start, because I don't know about you, but I get asked a lot of questions like what exactly is strategic planning and why is it important? So I'd love to get your definition of what strategic planning is and why you think it's important. I think it's sometimes very scary for companies to think about like you know, that's only for those big companies over there. It's not for me. But at least in my work with clients, you know from startup all the way through large enterprises, you know what I see is that if you don't have a plan, you're going to plan to fail, right? So what is your definition of strategic planning? And and tell me, why tell us why you think. Important.

Speaker 2

So before I get into my definition of it, there is a very popular video on the Internet that strategic planning is a lie and it's got tons and tons of views and and the kind of crux of the video is that strategic planning is kind of an oxymoron because you can't be strategic and plan and. And So what is that, what is strategic planning so planning. Is looking long term and strategic is choosing. To do things, either do things or not do things you know. Should I order the steak, or should I order the fish? And so strategic planning in the context of small to medium enterprises or nonprofits is really about saying, hey, where do I want to be? Where do we want to be as an organization in a short, medium long term and then what are the? Choices that I need to make in order to get there, which is either you know what do I prioritize, where do I invest? What do I do? And then in the context of today, it's like webinar is really like, hey, you've got 100 days left in the year give or take. Like you know, what are the things that you're must must do to win the year and what are the things that you must must do to get you to where you want to be ultimately? And and I think it applies both for organizations, for leaders and as well as individuals as like a human beings, you know, am I going to go to the gym or am I going to sit on the couch? That is a strategic choice, depending on on on what you do. So being able to embed a process like that in our decision making I think is extremely.

Speaker 1

Valuable, right? I couldn't agree more with you. And you know it's funny because there are so many times where I walk into a company especially and a lot of my sweet spot is sort of post start up, you know, been in business where I'll have proof of concept right around five years. And the owner got to sort of where the founder got to where they are by doing what they do right and then they get to a certain point. And it's like. You kind of went out of organic leads. You need to like, have a different skill set to manage employees. You've got different challenges coming up and I can't tell you I know if you find this amount of times I walk in. I'm like so where can I see your your plan? Where's your written plan? They look at me like I have 6 hats. And it's shocking to me, you know, that, you know, even companies that are are seasoned a little bit. They don't have that. So how do you know where you're going if you don't prioritize what because there's so many different ways, right? It's like you could set a goal where you want to go to California. Right. I would say it's like you don't get in the car and just start driving. It's like, do you want to take the scenic route? You want to get there. You know the quickest. So there's so many different competing ways to do things right. And if you don't really strategize, like, where are you going? Right. Where are you today? Where do you want to be and what's in that gap? And that's really the strategy, the actions and all of those things where they come into place. Right.

Speaker 2

Absolutely, yeah.

Speaker 1

So can you walk us? Through I know we're going to get to, you know, and everybody wants to learn,

you know, what do we do in the last 100 days of the year to really finish the year off strong if we haven't really focused on our initiatives as well as we could have, but take us through you know, because it's also important to lay the ground. Groundwork and foundation for the New Year. What's the process you use? To plan for a full year.

Speaker 2

So I mean, one of the things that I want to touch on that you had just brought up was, you know, walking into these organizations and I see the list of participants. I haven't had a chance to look at everybody's name, but they understand where they're at. But you walk in and like, where's your plan? And it's the difference between it's an implied. Plan and it's an explicit plan. It's like, hey, is it in your head and is it on paper? Does everybody know what the plan is? Or it just like some people know what the plan is or some people think they know what the plan is. So the, like, the nuance there is is critically important before getting into the process. But like within the process, you know, we look at it within, you know, 5 steps. And happy to send a slide out after for folks to view. And if you have a pen and paper, I encourage you to take it out. But the simplified version is where are we now? Where do we want to go? What is gonna get in the way of that happening? What do we need to prioritize in order to mitigate those risks? And then what are the things that we need to do to stay on top of the plan? So whether that plan is a three-year plan, a five year plan, a one year plan, a 10 year plan, the the process applies and then there's like sub conversations within it. But for folks that are you know newish to this or even just trying to add a bit more. Robustness. It's a really good framework to have because some people just try to get right into the doing. Without being really clear on their situation, the limitations, the considerations, the needs and so by kind of taking a bit of time. To organize before you plan. And when we do, let's say A2 day off site. 75% of the time is spent in the planning. 25% of the time is spent doing and so. So yeah, just to show how much of times gets spent into that. But I'm happy to dig more. Into that Gina as you.

Speaker 1

Have questions? Yeah, I would. I'd love to. Like, you know, even if you know, obviously we kind of all know it's like there's a mission. There's a vision there. You're. Setting your goals objectives like if you if you walk into somebody, you know who's kind of new to the process, right and they've never done this before like. If you could go. A little bit more in depth in terms of like how do you approach it? Do you, you know is there pre planning work done, you know and I know because I know my process I usually do some you know leadership questionnaires and you know really sort of on earthing and getting some information in in advance before I even go in. But I'd love to hear a little bit more. About, you know, sort of your approach to it and I think we can riff on it a little bit.

Speaker 2

Yeah, absolutely. I'm going to see if this will work, and since you know, I'm gonna see if I can actually screen share this and see if it'll it'll come up. But really, I mean, there's so much work to go that goes into this process. So, you know, as a starting point, figuring out. Doing a current state analysis as pre work. So what we do as part of our process is we do a survey with all meeting participants ahead of time to really try to get everybody kind of pre aligned. Ask some of those you know key questions that we have. We do interviews with folks to really help understand the deep. Part of it. And then we facilitate A2 day session. We're going to see if. This work that work. Gina, can you see my screen?

Speaker

OK.

Speaker 2

See, so this is. Our our verbatim agenda, which is public on the Internet, should you want to use it, and we also have free workbooks and that kind of stuff. And so really like I was saying, you know, where are we now? Where are we going? What's going to get in the way? So we really focus on, you know, starting the day. And this is like a typically A2 day or three day session and we do this with all of our clients. So this is the only thing we do. Start by celebrating. You know, what are the good things that were that built the foundation for where we're at? Because sometimes teams walk into a strategy session just trying to fix things and make things wrong versus actually saying, hey, the only reason we're here is because we have a lot of success. Swat scan, which you had kind of highlighted a Pestel analysis, which not a lot of people. Do and. It's about looking at what are the trends in the future that we need to be aware of, so managing the. Climate from a political, economic, societal, technological, legal and

environmental happy to dig deeper into this. This is kind of the fast version. Where are we going three-year vision. So the way we look at it is not a vision statement but really if we were totally successful in three years, how would we know? So in this case it would be September. 26th, 2027 You had asked me or you had asked how how's my family doing and all that kind of stuff. Before we started, I have my 10 year vision that I did in 2014 and I just ticked off the two kids. Two books like so. I'm like, right into my 10 year plan. I have it. It's funny. Mission. Who are we? What do we do? Who do we do it for? Critically important. Conversation. What's going to get in the way? Values and behaviors, which gene? I'm sure you and I could talk for hours on as it relates to performance risk analysis, which I think a lot of people miss in their strategic planning. I alluded to that strategic planning as a lie.

Speaker

MHM.

Speaker 2

V. Well, what makes a good strategic planning really strategic planning is by including a risk analysis or some sort of structure that informs your prioritization versus prioritization being arbitrary. So the risk analysis does that, what do we need to do high level focus on three strategic priorities. So that we're not trying to do everything. I see bad plans or plans that start off good and get bad start expanding their scope smart goals. So you know what success looks like. Action planning. Notice how far down the road the action planning is so you know we talked about, hey, the last bit of your ear, you still need to do all of this stuff to inform. Hey, what are those? You know, 3-4 major projects that I want to get in. Communication planning. How are we going to roll this out in our organization? And the last piece that we talked about is our critical capacities, which is how do you support the ongoing implementation of the plan? So I'm happy to go deeper into that later, but I wanted to try to summarize like this is the same. This is the aligned strategy development process. Do I have 30 more seconds, Gina?

Speaker 1

Yeah, please.

Speaker 2

OK, sweet. So the number one problem that we solve with teams and for those of you on the webinars, you're like, OK, why do I need strategic planning? Well consider is this you you know what we think about is we see a lot of teams and what we call them multiple destination trap. They have too many opportunities. They have too many different places, they're going different people are going in different directions. And so when you try to implement to your California example, some people think we're going to, I don't know if there's a California, Texas, some people think it's Northern California, Southern California. Some people don't even know what California is. They just happen to be along. The ride some people really don't want to go, but they don't say anything and so it creates frustration in in groups. And So what we do is we really focus on alignment, making sure that everybody is, you know, on the same page towards that one destination where specifically in California are we going, do you wanna go there and here's how we're gonna go about it. This is really about putting a good structure to have decisions so that when you're making a decision every single day, it helps you get to where you want to go. Cause if you're not getting closer to where you want to go, you're going further away. And I think that's a really important like contextual things for folks on the call. And again, I don't know who's on the call. And. What kind of things they think about, but you can apply this to everything in your life save work.

Speaker 1

100% I couldn't agree more and just it's to let everybody know they should have said this before. We're going to be taking questions at the end of this. So if you do have questions, if you drop them into the Q&A. I'm going to open that up. We will see those and we will address them after we just get through the all this information. So we definitely will be answering questions because that was a lot that answered great stuff that Anthony just shared. So you know you talked about, I mean I always say the two things well, Lauren. Offset it. So I'm gonna quote him. You know, if you have more than 3 or 4 priorities, you have none. So same thing, the multiple destination trap that you call. I think that's genius statement because. I don't know about you, but and I call it shiny new object. Also it's like you know where and I I worked at a company where we there would be like we'd walk into an executive meeting, we'd have 50 things from the week before, 50 new ideas and nothing ever got done. So. And you know, one of the things that I do when I'm in a strategic planning. Question because. First of all, people are kicking and

screaming at least. In my. Experience a lot of times getting them together. Then you finally get them in the room and they want to talk about everything and you can't stick to the agenda. If you're talking about everything. So I have this thing I say let's not solve that now, but let's document it and get all of the ideas right. But. It's why is it so important to just focus on a few things in your estimation?

Speaker 2

I'm. I'm trying to capture all that. Why is it important? I mean. How do I how do? I can. I. Can I show you another? Can I bring up another slide? Is that OK?

Speaker 1

You doing OK with another slide?

Speaker 2

Ohh, hopefully you don't have a choice. Everybody you're stuck. So no, I'm. I'm. I'm just kind of kidding. Kinda. This is really how how we think about it. So when we say imagine that your organization is a building and your building has 10 floors. So we're looking at the image on the left, OK. So every floor of your organization. But I. Company, business, whatever. It's 10 stories. You have 100% of your time, money, energy allocated to everything that you do. So if you have 10 different priorities, you have 10 different floors. That means if you're kind of spreading it evenly, like peanut butter, you've got 10% for each, which means that you're making a little bit of progress in a lot of areas, OK. But what most people don't think about is the concept of switching cost. So imagine you're in A10 story building. Every single floor has a different task that you're working on, but every time you switch a task, you have to take the elevator or the stairs. You need to get back to your desk. You need to like, boot up your computer. You need to like, boot up your brain. You need to, like, get focused on the task. So in addition to only having a little bit for each task, which is you're not gonna get very far, you have switching cost that is eroding your ability to focus, ability to get stuff done and then. So it's hard enough on the individual.

Speaker 1

Right.

Speaker 2

Now think think about this from an organizational perspective. You have a company or an organization that has 203 hundred, 400, hell, 105020, whatever employees and you say, OK. We came out of our strategy retreat and I'm really excited about it. I did it over a weekend without consulting anybody and here are our 10 strategic priorities. We're gonna focus on this. We're gonna focus on this. We're gonna focus on this. We're gonna focus on this. This is also priority. Well, we definitely can't focus that. That's so important. And this and that and this and that. How much of it are they going to remember? How much of are they actually going to do? And and what people don't think about is instead of picking one of those and doing it, they're gonna spend mental time wondering. Am I doing the right thing? Should I do this? Maybe this is the wrong 1. And so instead of picking one and being wrong, they will do none of them because it's the safest option.

Speaker

6.

Speaker 2

And most people don't think about the impact of their like directives on people because modern day survival is not looking stupid and not getting in trouble with your boss. And so by doing nothing, it's safer than doing the wrong thing, which is crazy. So what we offer is, you know, or I I we actually say here here's the choice. Would you want to. Be the building on the left. Or the building on the right. And if anybody wants to in the chat you can say yes, I want to be the building on the left or be the building on the right. I'm curious, but we offer say, hey, if we focus on three things. We get a lot more done. It feels like we get a lot more done. We say no to everything. For now. We focus all of our energy there. It helps everybody in the organization know what to work on. We make significant progress. It feels like progress and we decrease which in cost and so you don't get to the end of a year or a quarter or a strategic planning cycle. Where you're kind of in the same place, you're not exactly sure if you did anything. And then ideally you accomplish one of these and then you move. So say hey, we have to focus on marketing systems, great focus on the marketing systems, get them done and then then we can use it as like building blocks versus kind of spinning around in circles.

Speaker 1

Right, so smart, so smart. And it's funny. I always say it's sort of an opportunity cost, right? It's like. And a lot of times people will have an idea. Right. And I was working with clients yesterday and they said, you know, well we we're going to make this course and that's going to be, you know, part of our revenue or whatever I said. Alright. Well, let's look at that. And and you know how much is that bringing in and how much time did you spend? And then you look at the different revenue lines, right and their main revenue line is, you know 80% and the other things are, you know these these smaller little things. And I'm like you have to understand there's an opportunity cost, right, because you're going to create that thing and then you've got to promote it. Right. And what's the capacity? What can you really, what's the impact you can make with with those things? So I completely agree. And again it's like people get excited about things, but you have to sit there and that it's like, is that worth doing right, is and constantly be asking us? Because it's always the immediate is always coming at us and coming back to when I think one of the greatest things about planning is it keeps focusing at you on what's important, right, because we all have things coming out. It's day after day after day and you know, both personally and professionally, right. And if we don't keep our focus on what are the important critical things that must get done? To lead us to our goals, you wind up nowhere, right?

Speaker 2

Absolutely. And I'm I'm not impervious. I have, you know, the things that are like. Like the shiny objects that that told me like and and there are there is a case for that kind of thing, right there is a case for not having a plan that is so rigid that you miss out on opportunities like some opportunities that aren't in your plan are very good. Some things you need to build.

Speaker 1

Oh yeah. 4.

Speaker 2

For the long term, because you know, even though they start at 0 like they need to be built. And so that's like the importance of like, vision alignment over priorities. The the analogy that I that I talk about is, you know, what are you more focused on the road or the destination? You know, people get so focused on the road, the task, the task, the task versus the destination of here's where I want to be 5, ten, 1520 years from now. Betsy has a conversation about adapting the model. I'm happy to go into it. And answer it later. But fundamentally same model, you just have to be even tighter on the execution. But even more clear on the endpoint and happy to answer that more in depth.

Speaker 1

Yeah. OK. So getting back to alignment, because to me, I think alignment is the most one of the most important things, not just in business, but in life, right? So and you know, executives go in the the executive team goes in, they create the plan and you don't want it to sort of be like Moses. Delivering the 10 commandments right. So how do you, you know, when do you bring the team? Different team members in right beyond the executive team. And you know, how do you get people sort of aligned around the leaders vision so that because that I I I think I read something where it's like less than 30% of employees you know know what the company's vision is, where their mission is. So if you don't know what you know your company's vision is. And and even less know how they impact that mission. So what's your strategy like, how do you work with companies to get people aligned around a plan so that it is compelling and it is executed properly? Like.

Speaker 2

So just so I understand the question, I'm asserting that Moses and his tablets was like, here's where we're going. Everybody, let's go. Or just so I understand what you OK, great. They're originals happening.

Speaker

Exactly.

Speaker 1

Yeah. Like you're just kind of delivering it and saying here's what we're doing versus like which I, you know, you can do that, right? Is that the right thing to do to just deliver the plan? And but I always believe you, you sort of have to get adoption versus you know commanding it to be done at least that from my perspective. But I'd love your thoughts on that.

Speaker 2

Absolutely. OK. Well, we'll do a test, Gina. If I tell you what to do, what is your first instinct?

Speaker 1

Nobody wants to be told what to do.

Speaker 2

Well, just like you, you don't wanna be told what to do, right? Versus versus general. I'm only saying. Hey, Gina, we're doing this, and you're gonna say go. Ohh fall off a window. Whatever. OK, so for you guys listening to the call. What? What people don't think about is like the actual like human behavior, human psyche component of it. Even if it's in their best interest. Nobody wants to be told what to do. It is like ingrained. And so if you as a leader say here's where we're going. Some part of every single person is going to say you can't tell me what to do. Even if they're the boss. So there's gonna be some level of built-in resistance. And so to to successfully implement a plan, because I'm not talking about create the plan. Creating the plan is easy. Implementing is what we're actually about getting to where we wanna go is what we're actually about. So you have to say, OK, what is going to have the highest likelihood of buy in? And so instead of saying it is the leaders plan because that's bad in the sense of not moral bad. It's OK it has. To be our. So who is our our are the senior leaders because they are the folks that are leading the plan. So whether that's the board, whether that's the the senior leadership team, whether that's the senior management team, whatever, it's the big leadership team, whatever words you use. So let's say it's the exec. So it needs to be the executives plan, CEO and the rest of the executives. If it's not the CEO's fighting with everybody to try to get them on board. So what we recommend is spend the time, spend the money, spend the energy, get everybody bought in. So it's our plan as the leadership team. So it's our plan. We all want to go. So the 10 most important eleven most important people. And then when you roll it out to the company serious where we are going not here's where I am going. Now here's where the company is going. First thing great. You're giving them direction so they can follow better than nothing. A lot of organizations don't have that, but if you really want to make it work, you say here's where we're going. What do you think? Ohh, here's where the company is going. Where do? You want to go. How does where you want to go align with this? How do you see yourself contributing to this plan? How does this plan impact you versus this is how the plan impacts you. So it it's basically the same what you're asking instead of telling you're offering. Hey, Gina, do you want to go to California with me? Do you like California? Right. You know, if you don't like California and I'm like, hey, we're we're going to, we're going to Napa Valley, OK? That's where we're going on our trip. And you're gonna say, well, I don't like Napa Valley. I don't like the sun. I don't like tanning. I don't like golf. I don't like wine. Why are we going to Napa Valley? You're not gonna be very excited in the car ride, are you?

Speaker 1

Nope.

Speaker 2

1st is, hey, Gina, what do you like to do? Well, you know what I really like to do is shopping. That's not a judgment. Just, you know. And say great, well, you know, we're going to Apple Valley and there's some amazing boutiques here. You know, there's, there's this and this and this and this. But I know you like boutiques and I only like shopping and I know you like you know nice cafes with. Coffee and there's tons of them in Napa. Does that sound like something you'd be interested in going to be like? Heck yes. I'm gonna talk to you about the call for the wine. The other things you couldn't give a poop about it. So you're bought into what's important to you, not what's important to me. And so companies leaders get so focused on what they care about, they forget about what the people have. Oh, we're gonna make 10 kajillion. Trillion dollars. OK, well, it sounds like you're just gonna change a bunch of stuff and make my life harder. And you're not gonna pay me anymore. Versus. OK, well, here's how this is where we're taking the company and here's how it impacts you. Yes, we're going to be making a bunch of changes, but in principle, these changes are beneficial. You know? So yes, there's gonna be pain. There's gonna be changes, but. He like, where do you wanna go? And how can we make sure that we're going to the same place? Cause if we're not going the same place, we're going to different places. So I know I gotta divert it a bunch of different ways. But the ultimate thing is, how do you make it everybody's plan versus the leaders plan?

Speaker 1

Right now, I think that's that came through clear it's it's and that is I think so important because like

you said, nobody wants anything shoved down their throat to be told what to do. I think that there are ways to make things, you know, exciting for people, right, and get them involved and and and gain by them. So I do want to shift gears a little bit because this is an important part of the webinar. We talked about one of the things that I'm doing with all of my clients is we set up Q4 Sprint. Where we look at, it's kind of like and you know, it's sort of apropos to, let's say, of the fourth quarter of a football game. Even, you know, we've all seen games where teams are way, way down and can come back and completely win. So if let's say that you, you know, didn't follow through on your plan or you didn't have a strategic plan and you hadn't clarified. Priorities. What are some ways would you say you know what would you do? You know, I have ways. I work with my clients, but what would you? How would you help clients who came to you in that situation? They're like, hey, we still have 1/4. What can we do to make impact? Are there things that people can do? Companies can do to really, you know, sort of come back from behind, right and and win. The year out strong.

Speaker 2

So this might be a. Little bit we'll call. Contrarian is don't think about it like you only have the fourth quarter because and while it is like in a calendar like very, very true, it's typically the short term thinking that messes organizations up. It puts unnecessary pressure on folks such that they kind of. Do the wrong things fast instead of the right thing slowly, so I would still like take the time to say, OK yes, we have a quarter. Yes, we absolutely wanna make sure we get some stuff out the door, but let's make sure that it's not. We're not pushing nonsense work in the next three months. The where we really should say hey, we have a nine month. Project and the most important thing we need to do is a nine month project. So let's finish finish the year strong by doing the first three months of that nine month project because that is the most important thing. So like you're never too rushed to do the right work. I'm gonna sneeze give. Me one quick second.

Speaker 1

Bless you.

Speaker 2

Thank you very much and so but in that case, the first thing I would do is I would get the team together and say great, here's where we're at, you know, where are we at in our strategic plan? How did we do? And then look at what are the most important things that we need to do? I think it's called the Eisenhower Matrix of urgent and important. And so I would look and list all of those like kind of projects on and and and do the same approach was saying, hey, yeah, maybe we have 15 or 20 projects on the go. What of these things are really important for us? What are the things that are really impactful for us? How do we get that in? I might get really granular and say great. You know it is a Sprint. So let's apply really appropriate project management. Let's rescope those 123 projects. Let's make a really good project plan. Let's stay on top of it. Like it's hard to keep a project plan going really, really tightly. For, you know, 52 weeks, it's a lot easier to do it for 30. So just say we don't need to be perfect, we don't need to do it forever. Let's just focus on the motion. And like, build the habit of doing this and so I would say great project scope it one pick the prioritized 2 and I would think it really, really good for a short amount of time because not only will you make progress on that project, which is of course great. I think the bigger. Benefit you have is to really lock in good habits for a team. To say, well, we can do this. So I would say like for those that are on the call. Hey, what's one thing that's really important to you? You want to improve meetings, improve your meetings only for the next 10 weeks, they can go to \*\*\*\* after that, just say we're going to be a plus plus on meetings. We're going to be a plus plus on communication. Are we gonna be a plus plus? On financial reporting. Get it really, really tight for a short amount of time, you're gonna realize it's not as hard as you think, and then you're probably gonna sustain it. And that's really what's gonna crush it for the next year. But even in 3456 weeks, you're gonna notice. Whoa. We are so much better as a team. It's going to support better communication. It's going to be way less frustrating and you guys don't trust each other more. And like that is really the juice like projects come and go, but like the better you can focus on the dynamics of a team in the next three months trust building communication effectiveness, clarity that will pay dividends for a lifetime. So that's where I would focus the next. Three months.

Speaker 1

That's amazing. That's great. And it's a great way of looking at it. And I think that sort of segues into

the second-half, which is how to. Win the year. Right. And this is kind of what you you're you're alluding to is like, but now you're also setting up for success for the next year as well, right? So kind of getting a jump start and I think that that fourth quarter spent is really sort of. Getting people you know, because listen, people are people, right? So you kind of get to the third the the fourth quarter. It's like, you know, you're gonna have holidays. You're gonna have all these different things coming up that will take people's attention. We're human beings, right? But I think if you can really say, hey, listen like right after it's kind of like that back to school time. It's like we've got some time to still cover some ground, right. And how do we want to how do we want to cover that ground? And I think one of the the other things you know, I think with sales teams for instance, right is one of the things that I do is work with you know. My leadership teams is to say, have them sit down and go through pipelines and really kind of come up with like what's in that red zone. Right. And because people can, you know? We we can. Sort of like right about what's real and what's true. And it's like, what, what has a better than 70% chance of coming in by the end of the year and really focusing your attention really strategically right on those initiatives on those projects that you know you can really kind of make impact on? Over those next three. Months and then, you know, let's segue into like you know, how is that then setting you up for that next year? What are the steps that you're taking now with your clients to really set that they that the ones that you're ongoing with, let's say they are not the new ones to really set them up like for success for the the next year?

Speaker 2

Umm well I what I think is just really interesting about that. So you're the end of the year is fundamentally an artificial. Constraint and artificial constraints can be very helpful as human beings because they motivate you and there's like a time block. So if you're like, OK, I'm going on vacation in two weeks, you're gonna be extraordinarily effective in that two weeks. Cause you know you're going on vacation. You have to get it all done psychologically, setting up boundary conditions. It's just like setting up a game for yourself. So why it's helpful and why everybody's productive is cuz. Hey, it's just a game, so in the course of sales or in the case of sales, you're saying, hey, I wanna I wanna sell \$100,000 just in this quarter. Whatever it is, that's my target. And so it's a lot easier than saying, hey, I'm gonna sell 2 million. It's OK. Just this little tranche of work, just this little tranche of time. And so why most strategic plans fail from an execution standpoint is that 1100 days which is three years feels 1090. 6 feels very long and it is very long. It's hard to sustain that, but you can sustain 3 weeks. You can sustain 3 months, but as soon as you start getting over three months like you get tired and so set a measurable target set an artificial timeline. You can even break up this quarter.

Speaker

Yeah.

Speaker 2

Into four quarters. And say, great, there's ten weeks every 2 1/2 weeks. I'm going to do a debrief. Am I on track? What do I need to change? Most people don't set up iterative checkpoints to see if what they're doing works, because if you go on a losing tactic in effective tactic for 9 weeks, then you'll never know was it, you know, you could have stopped at week 3. The flip side of that and why I was saying. Three months isn't really that long. A time is that sometimes there's a lag time. Some stuff takes three months just to figure out if it works or not. And so if after three months it doesn't work and you're. Throwing it out. You know you're not. You're actually moving too. Fast. And so you kind of gotta be slow and smart. But it is an opportunity to do iterative tests. I'm gonna do this. Try this for two weeks, see what works again. It depends on context. Organization. So I think low and slow is usually the best way to go. But it is a really great time to get a lot of things. Off your list and and feel like at the end. Of the year like I got it done.

Speaker 1

Great. So walk us through a little bit. You know how you know you're going to set up now for the new year. Like are you working with clients now and checking in and saying hey? Let's get you. Know just our. Strategic plan, you know, are you advising and then you know, iterating on their strategic plan, going into the new year. Like how? How do you approach a new year?

Speaker 2

Personally, we don't. Because we've set up the here's where we want to be in three years, we just say,

hey, are we on track? Like are we made our plan? Let's work the plan and and then we stay on top of that the the planning cycles are. So for example there's a group that I'm working with in November, their planning cycle is November to November.

Speaker

OK.

Speaker 2

To versus a calendar year, but what helps them? Having the November to November is in September, I can say, hey, we are six weeks, 8 weeks, 3 months away from reviewing our strategic plan. It's a great opportunity to make sure you get the qualitative data that you need to know if what you did over the past nine months worked or not. It is a great opportunity to knock off some of those key projects to make sure that when we get into the review. We say, hey, we did this stuff. So the benefit of these type of constraints is it's technically called the punctuated equilibrium model. Most people won't do anything until half the time that they've been allotted to do it. So if you have like. Two months to do an exam.

Speaker 1

I've never heard that before. I've. Heard a lot of these things, but that's interesting.

Speaker 2

It's like a scholastic term and so not the book company, but just like in school. So yeah, if you've got a month to do a paper, you're gonna start it two weeks in because that is like your your brain to do it. So by having these types of constraints, it helps people. That's why we do quarterly check-ins. It's why we do monthly project calls. It's to, like, build the accountability. In because otherwise people get to this. Oh, it's a month, two months, three months before our three-year strategic plan. \*\*\*\*, we didn't do anything. Well, we might as well. Just, like, jump jump on it. So that's why I like the yearly. Reviews are critical. To make sure that there's there's accountability. So we just like, hey, let people work their plan and and give it a wider time frame. To really get the stuff done.

Speaker

OK, great. So.

Speaker 1

In your and and like did you want to leave a couple of minutes for and, and if everybody anybody has some questions, they're starting to come in on the Q&A, but just put them into the Q&A and we're going to go ahead and we'll we'll answer those. So. What in in your experience, Anthony, what are the characteristics and quality qualities of leadership teams that are most successful in executing their plans and achieving their goals? Is there a set of characteristics that you see?

Speaker 2

So this will be a. It's not a plug, it's we. We literally studied this. So this this is like people smarter than us have said here is what characteristics correlate with strong strategy execution. So strong alignment, making sure that we're on the same page, clear responsibilities and accountabilities.

Speaker 1

OK.

Speaker 2

Everybody knows what their job is and what their job isn't. So when we're having conversations, I'm talking to you as the CMO you're talking to me as the CEO. Here's my job. He's your job. Like we don't start getting into this, like, weird Venn diagram if you get. I mean communication, effective communication structures, which means not just, hey, we're talking, but we have regular cadence with the right stuff in it, tracking, monitoring, reporting. We're dealing with reality versus feelings. We need more sales, we need less sales versus we need 100,000 more sales this quarter or. Our customers aren't happy. We have 17 complaints about the same problem in the code. Whatever values, behavior. This. Ties into like strong psychological safety people can like challenge each other or call each other out on their BS that there's like clear expectations in terms of how we work together. I know you're on the East Coast, I'm on the West Coast. Different people have different approaches to like, do I wear my shoes inside the house? It's like, hey, how do we do things around here? The more clear. You know, the more clear ways we can do things, the easier it is. If folks on this call are from New York, I would probably, I would have no problem saying there's a way of doing things in New York that doesn't necessarily isn't exactly the same in somewhere like Hawaii or North Dakota or. Texas, there's a different way of doing things in Texas.

Generally speaking, and then leadership and change management, this is like the thing that you were talking about earlier around. Is it my plan or our plan? And are we like managing the change or are we pushing the change on people and expecting them to kind of like do what we say? And so if you have these characteristics that are supported within your organization? You are likely gonna have a strong correlation to strategy execution because it's not just doing a bunch of stuff, but rather putting the environment around your team. Team and your organization top down, bottom up. That supports effective collaboration, effectiveness, communication, trust and all that kind of stuff.

Speaker 1

That's great. That's great. So we're starting to get some questions. One was where can I find those screenshots that Anthony shared? I don't know if we can drop them.

Speaker 2

Oh, I don't even see that. Yes, you can find that on our website if you go to [smestrategy.net](http://smestrategy.net). If Gina wants to send out the slides, do I want to send out my slides? No, probably don't send my slides so you can. And I and I say that because it is, it is our full like alignment program kind of. Thing if you go.

Speaker 1

Anthony has a whole library of free resources on his site that he shares, so you know we will drop the link. In the chat Sharon, can you drop the link to everybody in the chat? Of Anthony's website where we can find him.

Speaker 2

If you go to our approach page, it'll show you those things and I'll walk through this and a couple of other ones that that we haven't covered. So our approach page is probably the best place to go on [SME strategy dot](http://SMEstrategy.com).

Speaker

OK, great.

Speaker 1

So from Betsy we have would you revise this approach looking three years ahead in any way for a complete start up and taking you back to the first thing you spoke about?

Speaker 2

I would revise the approach in the sense that for a startup there's a lot more learning points. So like it's a lot more iteration, but I would also go further out at the same. Time. So I would actually say if this startup is fully successful, like what do I want it to be in 10 years time, what do I want it to be in five years time? What do I want it to be in three years time? What do I want it to be in one year time and then I would then break it down to say if this is where I wanna be. I know where I. Want to be in 10 years? That's my like long term, but here's where I want to be in one year. Then I would iterate it and then I would just like test and iterate. There's so much testing and iteration has to go on and and start up mode. I'm a startup founder. I've had a lot of different businesses, more than I can cover in this webinar and which means I'm really good at doing things badly and so.

Speaker

In there.

Speaker 2

Yeah. So just, yeah, same approach, different level of zoom.

Speaker 1

And then we have a question from the perspective of using a facilitator. Can you tell me what are the benefits? Can our executive team just do this planning work on our own?

Speaker 2

I mean you.

Speaker 1

March.

Speaker 2

Could you could do it on your? Own are you?

Speaker 1

What's the benefit of what's the benefit of using a facilitator?

Speaker 2

OK, well, this is probably a whole other webinar, but in short, Robin, if your team is doing the work, don't. Use a facilitator. Now the issue is if you're not doing the work, the benefit of using a facilitator is that you have we have our own process so that you guys don't have to like try a process that doesn't work. The other thing is that it'll keep you more focused. We regularly hear people say like if this was up to us, we wouldn't have gotten past the first like 20% of this. Like we got more done in two days, this multibillion dollar organization said. This is the best meeting we've had in 15 years using our process because it's tight. The other thing is that as a facilitator, you know whether it's Gina or myself or anybody else really, it's like we can ask dumb questions like we can challenge the status quo. And we don't have the limiters of like ohh. I'm not gonna ask Steve because Steve didn't invite me to his birthday party last week, and we're friends off right now. It's like we ask questions because it just creates everything neutral. I have no relationship, which means I can call anybody out on the ship where it's appropriate, where everybody else is historically afraid to do so because it's like one of those sacred cows. There are a dozen other reasons the way I would think about it for you, Robin. Again, don't know your company, etcetera. Is that I I don't know how big your organization is. Anybody listening to the call? It's like, imagine if you've got 10 or 20% better, like everything you did got 10 or 20% sharper. So if you're a \$50 million organization, you have like 5 to \$10 million worth of increased organizational effectiveness. That's on the table by using a facilitator to support you in your strategic planning. So some folks might say like like I sit in \$40,000 meetings. That's all I do. Like that's how much a 2 day meeting cost with time and money, energy, hotels, all that kind of stuff. And for my clients they will pay for it gladly. And I'm sure Gina the same because they know that that's not a \$40,000 cost. That's a 5, ten, \$20 million upside by getting everybody focused. Because we can really dial your group in to make sure that you're getting the most out of it. So yes, your team could do it, probably, but are they? But the other thing I'll say about that is. If your team doesn't have a facilitator, you are the facilitator. So Robin, if you need to facilitate your team, it means you can't participate. Often it falls to a CEO and then that they can't lead the group and be part of the group they can't digest thinking because they're wearing too many hats. So for that, you know, kind of reason alone, it's worth the price of of getting a facility.

Speaker 1

Yeah. And I would say objectivity complete objectivity because you don't have a gun in the fight, right? So these are people you interact with every single day. It's going to be a whole. It's a whole different thing when it's somebody new from the outside and it gives it, I think a lot more, you know, credence and importance when it's like, wow, my company is actually cares enough to be bringing in this person. Right. And I know about you, but you start talking to people and doing the pre planning. People tell me things that like. You know, you're you're they're completely open with you, I think in a way that they're not necessarily, you know, with, with, with their their leadership. So that's a huge benefit as well. I think of of, you know, having an outside facilitator, but really also, you know, in addition to all of what you said before, but like then you are the facilitator, you can't participate. Right. So I think it's so important to to, you know to to have that. So are there any other questions, anybody? See anything in the chat if you want to throw it in the chat or if you want to just throw it in the Q&A. Nope, everybody good. We got one more.

Speaker 2

Hey, can I ask a question of folks? Is that is that? Yes, so. Alright. So so my my question to folks on this call is what is the one thing that you are gonna focus on with your team over? The next quarter? Like what are you not necessarily. What are you taking away? Because of course I'm interested in that too. But like, what is the thing that you're gonna do? Where is your strategic priority? What is the? Just do one. The thing is kind of like a in closing is. Don't try to do 10 things crappy Lily, do one thing really, really well. So where is the one area that you wanna focus on with your group, with your team, with your organization that if you built a project plan, if you got really tight on it that that would be the area that you would focus on. So that's my challenge. Question, reflection, etc. Patina it looks like there's another question in there.

Speaker 1

OK so. We got and Rachel said. She's going to focus on sales and prospecting and OK, another question we just got from Jeannie is what strategies do you use to get the employees to buy into the planning process?

Speaker

What's the? Strategies.

Speaker 2

So I mean the first thing is sharing the plan and the process, so like not just the plan, but the process that led to the plan. Here's how, you know, we made this thing, you know, we did surveys, we talked to our executive team. We met for 2-3 days. We walked through this process here. So we heard in principle that process is informed by stakeholder feedback whether that stakeholder. You know, every executive talked to their employees or had some idea of where their employees were at walking into the session in nonprofits. Sometimes we do formal stakeholder engagement, and then we say, OK, we got all this information. We came up with the plan. Now we're rolling the plan down. So here's where we're going. Here's what our priorities are. And then you say, you know everybody else. What do you think about this plan? Not like, do you like where we're going, but how do you see that you can support it? What are the questions that you have about it resolving questions or addressing unknowns? Is the best way to get engagement? Because if there's a question, consider there's a roadblock. If I don't know how something works, I can't do it. So it might be like redundant. Like hey, why are we switching the thoughts from red to blue? Just answer it because even if it functionally has no bearing on the actual work that the question will just be like a roadblock. So people won't be able to actually hear you until they get their question answered. I I get that a lot in strategy sessions where folks are walking into a strategy session. Stress with a bunch of existential questions. They can't hear a word I'm saying. So say, dump all your questions out on paper. We'll address them as we go through the process. But just, like, get them out of your head. So. Number one thing answer. Any questions that your team has about the plan about the process, about the implementation and all they care about? Spoiler Alert is what is, how it's going to impact them. That's all they care about. They don't care about you. They only care about themselves. So help them. Just feel comfortable with it and do that. Ad nauseam.

Speaker 1

That's great.

Speaker 2

And I'm happy to go more into it, Jenny.

Speaker 1

OK, great. Anybody else have any final questions?

Speaker 2

I saw one in the chat.

Speaker

Say.

Speaker 1

I think it's pretty similar. Can you share some strategies with the lining senior executives if they all have different opposing opinions?

Speaker

Hmm.

Speaker 2

Your team likely has opposing opinions, so we have a ground rule that says like disagree. Like disagree but commit and it's not exactly that. That's technically an Amazon one. Most of the time senior executives do agree, they just can't hear each other over their own desire to be right. And so why a facilitator is helpful again, whether that facilitator is external and internal, the facilitator is helpful because they can kind of take the personal out of the communication. So you're saying I think we need to focus on sales. And then the other person says, well, I think we need to focus on revenue. And then you disagree, because one's focused on sales. One focus on revenue is like ultimately you guys want the same thing. You just want growth, but you can't hear each other over your own desire to like be the right one, which is a problem with executives, especially ones with engineering backgrounds and so. Ultimately, it's about what is the differing opinion and if you totally disagree then say what are the facts I need for plan A? What are the facts I need for Plan B? Let's go through it and pick one and be satisfied not only with the outcome but the process, but most of the time they're not that far off. It's. The balance between implied and explicit most communication isn't explicit enough that there's open to interpretation, so remove as

much interpretation as possible. You will likely find that people actually are more aligned than you think.

Speaker 1

It's totally true. It's like the narcissism of small differences. As for, I would say.

Speaker 2

I like that. I like that I never heard that one before.

Speaker 1

Yeah. It's like people are more alike than they than they think they usually are. So kind of creating those differences. But yeah, I think you're right. If you just sort of like align them and show them that you, we're really looking at the same thing. It's just from a different perspective. So that's great. Anything else before we wrap.

Speaker 2

Uh, for for me or guests? Chats.

Speaker 1

Well, from gas or from you or from? Any final words of advice on how to win the year strong and set yourself up for success for 2025 and beyond?

Speaker 2

My short answer was just do the work. Yeah, I I think my longer answer would be if there was only one thing that you did. Ohh, let's call it 2. The first thing I would say is get your team together to have a conversation about what winning the year actually looks like, because one person's win the year might be the other person. A different person's win the year. Or like if you get what I mean, everybody have a different. Perspective on on. What that is? And then the second. Thing I would do. Is I would make a time budget for your group to keep discussing that conversation. And so I would say, OK, two hours a week for the rest of the year, we're going to meet on Tuesdays at 99 to 11, and we're just going to talk about how are we winning the year? And like calendarized it block it out, allocate the budget, protect the \*\*\*\* out of it, and don't let anything come between it and just the. Like the practice of blocking that time will create a lot more rigor that your team will feel. They'll be less reactive, they will be more proactive. They won't be in survival mode, dealing with operations. It is like their time to like, step back and deal with strategy. I think if you can a do it once B do it more than once. You will get so, so much. You'll get dividends from investing that time, but you need to allocate the time just like you would allocate the money.

Speaker

OK.

Speaker 1

It's great, great advice, really great, really smart. All right. Well, I want to thank you, my friend, for this and I'm super excited that we finally got to do this. And it was really a pleasure for me. And I look forward to many more collaborations. Where can people find you?

Speaker 2

If you have any strategic planning questions, you can type them into Google and put SME strategy at the end of it. SME stands for small to medium enterprise. And then so you can basically find anything we give away pretty much everything you might need. And then on LinkedIn, Anthony C Taylor on LinkedIn would love to connect with you. I've got a podcast on strategy and leadership if you want to listen to more of this stuff, but happy to have a chat and support and, you know, talk through anything you want to talk through, cuz I've got a lot of time on my hands.

Speaker 1

And that is not true. But yeah, but you're you're very, very generous so.

Speaker

Well.

Speaker 1

We're going to have a question. Will there be a replay? Yes, there will be a replay. We will be sending that out and I will also in that e-mail that we send to you, we'll send links to to Anthony's website and to mine. And if there's any questions whatsoever, we are, you know, we're here for you. So, wishing you guys all a great day and thank you all for attending and.

Speaker 2

Awesome. Take care of y'all. Appreciate you.

Speaker 1  
Thank you.