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WHITE PAPER

From strategy to **Playbook**

You and your team have worked hard to develop a strategy to secure your company's growth. Now the challenge is getting your whole team to make astute decisions in real time on a playing field that is continuously changing. For that, your company needs a playbook.

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Disclaimer:

Aligned with our mission, 'We build the people who build the businesses that build Africa', we facilitate open, multi-perspective conversations and the generation of thought leadership pieces, such as this white paper. However, the views expressed in this white paper are that of the author and not of Henley Business School Africa.



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Abstract

Strategy formulation is the widely accepted approach to preparing an organisation for the future. Yet the hours of contemplation and brainstorming by the company's most senior leadership seldom yield an outcome that supports or drives tactical decision-making.

Based on practical experience, this paper indicates how a formal document can be turned into a lived experience, where all team members in an organisation are empowered to support the strategic vision and navigate the changing market conditions effectively to keep the company on course.

Suggestions are made for the incorporation of a playbook, which refers to an indispensable decision-making guide that is continually updated as the company grows and the leaders learn. A good company playbook integrates four elements that make up the **CAFE Framework™: Clarity, Accountability, Focus, and Energy.**

Clarity is about the three Ps that make up the business DNA, the key to astute decision-making; accountability invites all employees to take appropriate ownership, with the kind of support that sets them up for success; focus points everyone in the right direction, with real-time feedback on the impact of tactical decisions; and energy encourages everyone in the organisation to make a meaningful contribution, freeing up the company leadership to look ahead.



Introduction

A company strategy that maps out **the company's future** is an important document for investors and strategic planners, but can be intimidating for the managers and team leaders who are expected to translate the strategy into reality.

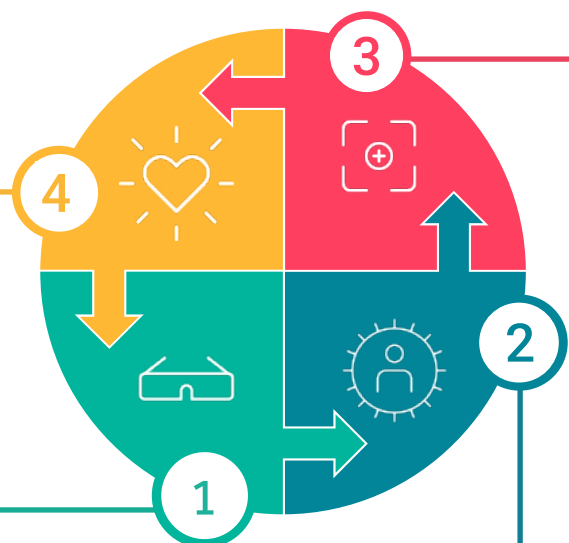
This document takes you on the journey from conception to the application of a guide that shares with your employees what you have in mind to reach new heights in your company.

By **developing, implementing, and maintaining** a unique playbook for your organisation, you can empower employees to think for themselves and make good decisions, rather than constantly hovering over their shoulders to check they are thinking like you.

By using the framework presented, you can stop fretting over poor decision-making, a lack of ownership, and misguided priorities. Instead, you provide the context for everyone in the company to contribute meaningfully and accomplish something remarkable together, knowing that the result will delight your shareholders.



**Empower
employees
to make
good decisions.**





Strategy has its **place**

In the 1990s, we used to rely on map books to get to business meetings in unfamiliar districts. Finding a new client's office required driving down streets looking for street signs and comparing them to what was on the map, open on the passenger's seat. Then, when one found the street, the next challenge was looking for street numbers on buildings to figure out how far one still had to travel to get to the client, and in which direction. While moderately effective, this method was fraught with risks, the most significant of which was taking one's eyes off the road to squint at labels on a street map.

Street maps still have their place. Town planners, property developers, estate agents, and emergency services rely on them to provide clarity for planning purposes. However, those of us on the road are far better served by navigation services that not only tell us exactly where to turn, but also update directions based on traffic density, alert us to road hazards, and provide options for a quick bite to eat or to fill up the petrol tank nearby.

Similarly, strategy has its place. For any business with ambitions for the future, it is helpful to get the leadership team together to reflect, compare notes, and consider how best to achieve that Big Hairy Audacious Goal, or BHAG, that Collins and Porras (2005: 226) defined as a 'unifying focal point of effort'. Strategy is good at capturing high-level approaches agreed by executive leadership. An example is whether the company will look to achieve growth organically through ongoing efforts to drive sales and optimise operations, or incrementally through acquiring smaller companies with attractive market share, offerings, or intellectual property.



**Get the
Leadership
Team Together.**

Why strategy often gets a bad rap

Much has already been written about why strategies fail. The most widely quoted strategy statistic is that nine out of 10 strategies fail, which originates from an elusive Fortune magazine article titled 'Corporate strategists under fire' by former editor Walter Kiechel III (Jones, 2012). While the article itself is hard to find, Kiechel (2010: 172) referred to the article in his book *The Lords of Strategy*.

Whether or not it can be proven that so many strategies eventually fail, even expert strategists concede that strategies do not consistently deliver the expected results. Kiechel (2010: 172) reported that each of the consulting firms he interviewed for his article acknowledged, on condition of anonymity, that less than 30% of their clients implemented the strategies they helped to craft.

A global survey of 583 executives, half of whom were C-suite executives and the other half senior managers, revealed that most of these companies fall short in the area of strategy implementation, even though they acknowledge its importance (The Economist Intelligence Unit, 2013). Interestingly, respondents identified leadership buy-in and support as the most important contributors to successful strategy implementation. However, only half of the executives believed that there was appropriate C-suite attention to making strategies happen.

In another study, researchers conducted 40 experiments to see how changes in companies would impact strategy execution (Sull et al., 2015). Initial indications were that pervasive myths get in the way of strategy execution. Despite evidence to the contrary, many managers still believe the key to successful strategy execution is a bureaucratic blend of alignment, compliance, top-down communication, and the old favourite, a 'performance culture'. McChesney et al. (2012: 12) concurred, indicating that – despite communication efforts – employees lack an understanding of the strategy and how to implement it, companies do not monitor progress, and no direct incentive or accountability exists for the implementation.

The picture, then, is one of executives not following through on the plans they have created, and managers left believing that success will come if everyone just pays attention and toes the line. One could bemoan the inconsistency of executives or the inadequacy of strategy, but perhaps a more constructive approach would be to consider the perspective popularised by Eli Goldratt, the physicist who applied his fundamental system of beliefs to management theory, delivering controversial and often counter-intuitive perspectives on business success. Goldratt, in his characteristically irreverent tone, once said 'Tell me how you measure me and I'll tell you how I will behave' (Goldratt and Goldratt-Ashlag, 2010: 43).

Perhaps it is not that difficult to understand why successful executives focus their attention on tracking and addressing dynamic market changes, rather than monitoring the implementation of a strategy devised long before those changes occurred. Expecting a strategy to deliver dependable results despite unpredictable market changes is a bit like depending on a street map to get to a client on time despite unpredictable traffic changes.

**Pervasive
myths
get in the way of
strategy
execution.**

Adopt the idea of a playbook

In sports, a playbook is the key to success, translating the team's strategy into practical tactics that can be translated into moments of brilliance in the heat of the moment because everyone on the team can read the game and knows which part to play (Bach, 2021). In business, a playbook can similarly empower leaders – from executives to first-time team leaders – to make astute decisions in real time, because they have answers to the most important questions about their business and they understand what to look out for in the business. Making these insights available to every leader in your organisation is key to developing the organisational agility required to navigate a fast-changing market.

While all employees are invited to share the company vision and all leaders in the company have access to the company strategy, very few are adept at tactical decision-making, perhaps because they are simply not asking the right questions. Good tactical decision-making contributes more to company growth than good planning. As Buckingham and Goodall (2019: 45) stated, 'Plans scope the problem, not the solution'.

A playbook has the answers to the most important questions.

Drafting your company's unique playbook

What is a playbook?

Your playbook is unique to your organisation. It contains not just the recipe for your organisation's 'secret sauce', but also clarifies the key roles in the kitchen and how to ensure that the 'sauce' remains both irresistible to your customers and tantalising to new markets. Most importantly, your playbook contains your organisation's approach to ensuring that everybody's contribution is valued and appropriately rewarded.

Experience gained from 12 years engaging with corporate leaders across several market sectors, through facilitating strategy, teamwork, and leadership development, indicates that leaders just need to attend to the four key elements of Strategy Activator's **CAFE framework™**, to handle the heat in the kitchen and keep that secret sauce coming:



Clarity

What makes us who we are?



Accountability

How do we get everyone to own the outcome?



Focus

How do we know we are really contributing?

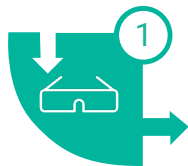


Energy

How do we inspire everyone to really show up?



The CAFE Framework™



Clarity

What makes us who we are?

Founders and CEOs are often the envy of senior executives and team leaders because they seem to intuitively understand how to make the right decisions under pressure.

A good friend of mine is the chief people officer in a leading financial institution and he shared this account. He explained that, while they have got some excellent leaders in senior management, often when senior leaders meet to discuss a pressing issue, the CEO will look in, pull up a chair, and listen to the discussion. After five or 10 minutes, the CEO will ask a question that will have everyone else in the room looking at their shoes. The reason for this is twofold. First, no one at the table has a good answer. Second, they realise that the CEO's question is pivotal to finding a solution and they are all asking themselves why they, already an hour into the meeting, have not asked the same question. It is not that the executives are unclear on the strategy, but they are typically just unclear on how to apply the thinking behind the strategy to the current, unexpected challenge.

The most important role of any leader is to provide clarity. Lencioni (2012: 15) maintained that communicating clarity is not only the second most important discipline of a leader, but also the third and fourth most important discipline. **Clarity is more about the questions your leaders ask than the answers they give** because, as Dalio (2017: 414) put it, 'great questions are a much better indicator of future success than great answers'. From experience, the questions that lead to the kind of clarity that matters, are about three Ps. Together, your purpose, principles, and promises make up the business DNA – a reference point for all decisions in your company.

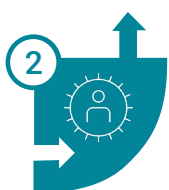
- Primarily, your company needs a clear **purpose** – a strong sense of why something is important and why you should keep going. Sinek (2009: 68) believes that this is the most important question for individuals and organisations alike, as the answer – more than anything else – is what inspires others to take action. This forms the core of the business

DNA, and if you are going to build a strong team that contributes meaningfully to company growth, despite all the challenges, barriers, and distractions along the way, then you and your team need to know and relate to a purpose. Mackey and Sisodia (2014: 46) explained company purpose as both the glue that holds the organisation together and the magnetic force that attracts the right employees, customers, suppliers, and investors. Not to be confused with your mission, purpose is not so much what you are determined to do, as the reason why you are determined to do it. It is a sense of knowing and understanding the value of the work that you do. This is what gets you out of bed in the morning and what keeps you going when your plans backfire.

- Once the purpose has been established, you need to clarify the **principles** that will hold your leadership team together and empower all decision-makers in the company to support them. Most companies have a set of values and values have their place. However, from experience, company values do not drive decisions under pressure. To build an effective, flexible, and resilient team, clear principles are a necessity. These are the deeply held beliefs that will inform your decision-making. They are the non-negotiables for the way you and your fellow executives engage with others, and the way you lead. If you consistently apply these principles in your decision-making, the people you lead will find it easier to follow your example (Dalio, 2017: 100). Equally, if your company leaders are cohesive and consistent in their decision-making, your key stakeholders will discover what you stand for as a business.
- Once your purpose and principles are clear, you need to clarify who really matters in your business and what you **promise** to each of these stakeholder groups. This is not about your offering, but about what your offering will do for your customers. Miller (2017: 128) emphasised that every prospect should be clear on where you want to take them. Customers may buy products and services from you, but they will only become loyal when they see that your company fulfils your promise to them consistently over time. Sisodia et al. (2003: 21) referred to this as the emotional contract, mostly explicit or unspoken, that articulates what stakeholders 'want to experience, and what they want to avoid experiencing'. Chouinard (2016: 102) and his team provide an 'ironclad guarantee' that goes with every product they make, believing that a Patagonia product should be 'identifiable even from a distance by the quality of workmanship and attention to detail'.

According to Reichheld (2011: 145), it is only once employees are inspired to promote the company that customers will become loyal. Employees may work for a salary and a bonus, but they will only become loyal when they see that your company fulfils your promise to them consistently over time. The same is true for all stakeholders. Loyalty needs consistency to grow. Practically speaking, 'promise' is a noun, but also a verb, and therefore promises require action.

- It takes **courage** to give someone accountability. You are taking a risk, as you are entrusting part of your success to someone else, with no guarantees. In turn, these people will only take accountability in an environment where they feel safe, seen, heard, and respected (Brown, 2018: 12).
- To make delegation work, you need to be **curious** about what is possible. Without curiosity, you will be tempted to dictate exactly how to reach the outcome, reducing your team to being followers of your instructions rather than being independent thinkers who contribute to your outcome. Brown (2018: 91) eloquently framed curiosity as the transformation from 'always knowing into always learning'. When you are open to new ways of achieving your intended outcome, you will begin to discover what your team is capable of. Grant (2021: 54) called this 'the thrill of not believing everything you think'.



Accountability

How do we get everyone to own the outcome?

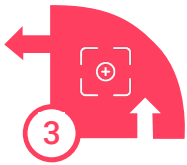
Accountability often makes the news headlines and it is typically mentioned in the context of someone demanding that someone else be held accountable for poor results. **Accountability only works if there is a healthy discipline of reviews** – with reporting, feedback, and either rewards or consequences, as appropriate. But there is something more important than the review – contracting upfront. How many times have you found yourself in a quarterly review, discovering that your manager's picture of success was different from yours all along? While this disconnect is often labelled accountability, it is really just blame. **A courageous leader will engage team members upfront**, unpacking, and even co-designing the intended outcome.

When looking up the definition of accountability in most dictionaries, you will find something like 'to take responsibility for something', suggesting that accountability is synonymous with responsibility. In practice, there is a critical difference between the two. I have found that this confusion lies at the root of most failed strategy implementations. In essence, we take responsibility for actions and resources, and we accept accountability for outcomes.

If you reflect on recent status meetings, perhaps you will notice a distinction between those executives who report on effort and those who report on outcomes. The latter are the ones effectively saying, 'Leave it to me, I'll get it done'. Getting accountability right requires courage, curiosity, and acumen.

- The third element of accountability is **acumen**, which is the ability to make good decisions and wise judgements about what aspects of your goal to delegate, and which team members to delegate to. Charan (2017: 101) unapologetically labelled decisions made without acumen as false decisions, because the people charged with reaching and acting on a decision fail to engage and connect. Without acumen, you risk setting your team up for failure, which translates into setting yourself up for failure.

Typically, the phrase 'holding others accountable' conjures up images of unleashing pent-up frustration, hauling team members over hot coals, or grabbing them by the scruff of their necks. But what if it was the kind of holding that offered reassurance under pressure, such as a steady hand giving your team member the confidence that if things are not working out, you are available as a sounding board? How might this approach improve your chances of success? Of course, you would only be willing to provide that kind of support to someone you trust enough to give the benefit of the doubt, someone you know is on the same page as you. **You are on the same page because you sat down together at the outset and checked that you both have the same picture of the expected outcome in mind, as well as the level of commitment required to get there.** This picture is the basis for an upfront contract that includes clear consequences for both success and failure to bring the picture to life (Bustin, 2014: 90).



Focus

How do we know we are really contributing?

This section of your playbook helps team leaders work out what they need to focus on today to achieve the anticipated outcome.

If your monthly management committee (ManCo) is anything like the many I have seen over the years, then it is a combination of presenting what happened last month and justifying results that are over a week old. Either way, there is not much time left to focus on the road ahead. If you are tired of driving your business or your team while looking in the rear-view mirror, then it is time to stop relying on your monthly ManCo meeting to guide you for the month ahead. What you need instead is for all team members to see how effectively they are contributing all the time, so that they can make informed decisions, realign where necessary, and avoid wasting company resources.

You have probably got some form of a dashboard, but the challenge with dashboards is that they often end up looking like the cockpit of an airliner, with tons of information presented in a very specific format. Unfortunately, this only means something to a very small number of people in the organisation, and even they often disagree on how to react to what they see on the dashboard.

- **What do you really need?** A visual management tool is crucial. A good one will pass this test: anyone who looks at it will immediately know if you believe you are on track to achieve the outcome you are accountable for. In other words, one look at your visual management tool will make it clear whether or not the critical aspects of your business are healthy. If they are, you can turn your attention to future growth, knowing that your business fundamentals are strong.
- **What is the value of a tool like that?** It is inclusive, not exclusive, because you want to make it easy for everyone to see the big picture. Then, people can help or support where needed, rather than be separated into silos, where they keep their heads down and hope the rumours are not real.
- **How do you build a tool like that?**

You will need four key elements for a dashboard that aligns focus and drives collaboration:

1. **Indicators;**
2. **Metrics;**
3. **Threshold values;** and
4. **Responses.**

The goal of being in business is to grow annual earnings and the value of your organisation over time. Consequently, your dashboard should speak to both elements. It will require a series of conversations with your team to arrive at the right indicators – arguably the most important conversations you could have with your team.

Next, you need a metric for each indicator. For the indicators, you can quantify and identify a unit of measure, such as monthly revenue, percentage billable hours per week, or average resolution time for complaints. For the indicators that are important but cannot be quantified, you can use a rating scale to summarise, for example, feedback on projects or team energy levels. A rating out of 10 is easy to visualise, but feel free to use a scale that makes the most sense to your team.

Thereafter, you need threshold values, which are the values that, when crossed, trigger a change in status. I recommend using the RAG format – for red-amber-green – as it is simple and anyone who has seen a traffic light gets it. This does not mean everyone will agree on the performance levels represented by the three colours, so you need to get consensus in your team on the threshold value for changing from green (everything is on track), to amber (there is a problem), to red (there is an emergency). If you have not had a conversation like this before, you will probably find there is a wide range of perspectives in your team, and a great benefit of designing your dashboard in this way lies in the open dialogue with your team, surfacing different opinions and perhaps some hidden assumptions. From experience, these sessions can get quite heated, so it may be helpful to bring in a professional facilitator to guide the conversation to a meaningful outcome.

The challenge with many dashboards is that they either do not drive behaviour or there are different perspectives on how to react to dashboard readings, they drive confusion instead of cohesion. Worse still, I have seen many situations where flashing red lights or warning messages are simply ignored, because 'that's not a big deal, it's been like that for ages, but we work around it....' The best way to combat this confusion

and apathy is to agree on a standard response per threshold across the whole dashboard. You could spend hours trying to identify specific actions required for each individual indicator, but the chances are that the indicator is impacted by a situation you had not predicted, so your proposed reaction will be ineffective.

Trying to specify this level of detail is like designing strategy – it will probably be overruled by your team in the heat of the moment. That is a good thing, since when things fall apart, they will be making decisions based on what actually happened, rather than what you predicted might happen. So, how could standard responses look? Remembering what we know:

1. We operate in a volatile market.
2. We employ people capable of thinking for themselves.
3. Our people will make decisions they think are best, given what they know.

The best response to any problem or emergency is to get the team working together to gather data, assess the situation, and make an informed decision. Over time, your team will come to trust the dashboard more and more, understanding that it is informed by experience and represents what they believe about the future. A significant benefit is that any new team member can quickly get up to speed on what really matters in your part of the business, and start making a meaningful contribution to both performance and growth.



Energy

How do we inspire everyone to really show up?

Now you have a strong performance framework in place, with everyone in your team clear on what matters most, taking accountability for the outcomes required from their roles, and focusing on the most important priorities, what remains is to energise your team. While they will probably do whatever is necessary to earn their salaries, you will need to generate energy in your team if you want them to bring their best selves to work and make meaningful contributions. This is not because you owe it to them, but because you owe it yourself. **Generating energy is far more fulfilling and far more rewarding than micromanaging** a group of individuals who are checked out emotionally and dragging their feet to every status meeting. In fact, Nyati (2019: 122) described employee engagement as a source of sustainable competitive advantage.

If it is up to you as the leader to generate energy, how exactly do you do this? Here is a helpful acronym – remember that, like yourself, all your team members have 'LIVES' beyond work:

- First, **listen** to your team – beyond what they are saying, to how they are showing up, what drives them, and what this says about who they are. It is equally important to listen for what they are not saying, because the gaps provide helpful clues (Klemich and Klemich, 2020: 219). When you start to form pictures of the individuals in your team, you are ready to connect with them. This is the first step towards generating energy because, by listening to who they are, you are silently telling each team member that they matter and that you care.
- With a sense of who your team members are, you can begin to think about **inviting** them to contribute in a way that connects who they are and what the organisation needs. In this way, you invite your team members to do meaningful work that will energise them.
- The third step towards generating energy requires that you intentionally **value** employees' contributions in a way that speaks directly to each team member. All of us want to know that our contributions are really valued. So, the question is: 'How will this contribution be rewarded?' If the reward does not inspire meaningful contribution, then it remains just a salary, an expense. Ironically, the way to turn this expense into an investment is not necessarily by increasing someone's salary. The key lies in including intangible rewards.

Now, you have got your team members' attention by taking an interest in them, inviting them to make a difference, and giving them access to opportunities. This is a critical point, where the question becomes 'What will you do with that attention?'

- You need to **engage** your team – this is how you make it clear that you need their best contribution – rather than simply leaving them to their own devices. In engaging them, your goal is to get them out of their comfort zones, because that is where growth happens. All of us are energised when we grow, even if it may be a bit uncomfortable for a while.
- This is why **support** matters. Your team needs to know that you have got their backs – not to provide the answers, or tell them what to do or even to make it acceptable, but to be there as a backup when they need support. Buckingham and Goodall (2019: 28) found that team members who trust their team leaders are 12 times more likely to be engaged at work. When your team knows you have their backs, they will go out and give it their all.

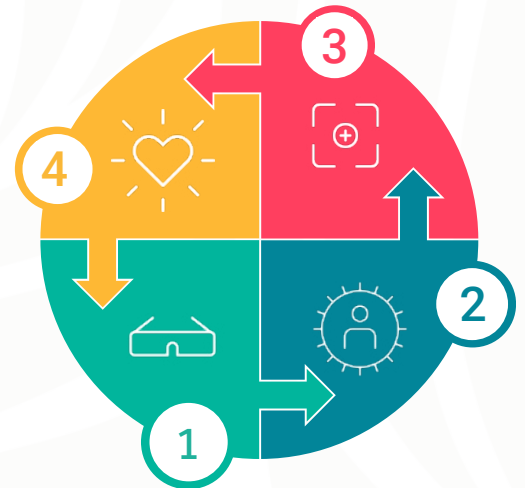


Keeping it real

If you want to implement strategy effectively in this new world of work, where working conditions and expectations have changed significantly, and continue to change, adopt the **CAFE Framework™**. Start with creating clarity about purpose (why your work matters); principles (how you make decisions); and promises (about deliverables to your key stakeholder groups). Second, inspire accountability through courage, curiosity, and acumen – transferring ownership of appropriate outcomes to your team, linked to their roles. Third, align your team's focus, agree on the key indicators, metrics, threshold values, and appropriate responses. And, most importantly, generate energy by:

- Listening to discover who is on your team;
- Inviting your team to contribute meaningfully;
- Valuing team members' contributions by investing in intangible rewards that will generate returns in the form of discretionary effort;
- Engaging your team members to step out of their comfort zones; and
- Supporting them all the way, demonstrating that you have their backs.

All the very best as you develop your own playbook for generating tangible return on investment.



Clarity

What makes us who we are?



Accountability

How do we get everyone to own the outcome?



Focus

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Energy

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