A Tale of Two "Cindies"

Four Disciplines to Help You Achieve Your Most Important Goals

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Podcast Transcript

Hi, I'm Scott Blades. Welcome to "A Tale of Two 'Cindies.'" In this podcast series, we'll investigate the dos and don'ts of leadership by following two fictional professionals: Cindy Hay and Cindy Bea. By most measures, these professionals are the same. They're the same age. They have the same amount of education and professional experience. However, Cindy Hay struggles as a leader while Cindy Bea thrives.

In this episode, we'll explain four disciplines of execution to increase your team's ability to achieve its most important goals. We'll then follow the "Cindies" to work to see the difference these disciplines can make in team performance. Cindy Hay's team will not apply the disciplines; Cindy Bea's team will. We'll conclude by reviewing each team's performance through the lens of the four disciplines of execution. Let's get started. Has your organization ever created a goal that never came to fruition? Has your team ever returned from a retreat or strategic planning session with lots of great ideas (only to have those ideas sit in a filing cabinet)?

Has your team ever worked toward a goal and completely missed the mark? Why does this happen? Why is it so hard to get things done? In their book, The Four Disciplines of Execution, Chris McChesney, Sean Covey, and Jim Huling (2012) of FranklinCovey make the point that each of us faces a "whirlwind" of urgent activity in our jobs. Our day-to-day tasks are often so time-consuming that it's challenging to execute anything new. The whirlwind steals the focus and energy you require to move your team forward (p. 6).

The authors explain that overcoming the whirlwind and achieving your most important team goals takes four key disciplines.

The first discipline is to focus on the wildly important.
This is a challenge for many organizations. Leaders who want to improve their organizations often make the mistake of trying to accomplish too many things simultaneously. When presented with loads of great ideas, they're unable to say "no." Their teams end up with 10, 15, or even 20 important goals, and this overload results in no one being able to focus. The whirlwind takes over, and few of these big ideas ever come to fruition (McChesney et al., 2012, p. 10).

Teams with a smaller number of wildly important goals (or WIGs) are able to pool their resources and put enormous energy behind their top priorities. To paraphrase Stephen Covey, teams like this have the courage to say "no" to many things because they are passionate about their bigger—and more important—"yes" (McChesney et al., 2012, p.30).

Consider Apple. In August 2012, Apple's market value soared to 623.5 billion dollars making it the most valuable public company in history. Founder and CEO, Steve Jobs, was notorious for rejecting great ideas from his top engineers. He wanted his company to stay laser-beam focused on a small number of products and be the best. The result? You can fit every Apple product on a single table, and they are the most financially successful public company—ever. For example, Apple doesn't make twenty different phones. They make one phone—the iPhone—and it's one of the most coveted pieces of technology on the planet (McChesney et al., 2012, p. 25, 29).

The second discipline of execution is to act on lead measures.
Lead measures are the actions that will lead to your desired result. These are the actions that will produce the biggest bang for your buck. Some actions will have greater impact than others when attempting to reach a goal. If you and your team can identify and act on these strategies, you will be much more likely to achieve success (McChesney et al., 2012, p. 11).

The best lead measures are predictive of achieving a goal. They should also be actions that your team can control directly. Consider the simple goal of fundraising. The ultimate objective is to raise a certain amount of money. One lead measure could be to make a certain number of solicitation calls per week. Another lead measure could be to set up a specific number of meetings with potential donors each month. Executing on these measures will increase your likelihood of achieving your goal. Both of these strategies are also within your sphere of influence.

The pitfall in many organizations is that there is only a focus on what are called "lag measures." These are the end-game results. How much grant funding did we receive this quarter? How many students did we enroll this past semester? What was last year's customer satisfaction score? When you receive this information, the performance that produced the results has already taken place. Lag measures are obviously very important because they represent your ultimate goals. However, as leaders, it's also important to engage your team in lead measures. These are the critical behaviors that produce achievement (McChesney et al., 2012, p. 11-12).

The third discipline of execution is to keep a compelling scoreboard.
Here the authors make the point that people play differently when they're keeping score. If you watch teenagers playing basketball at a park, for example, you can tell whether or not it's a real game. If they're just shooting baskets, there is a lower level of engagement. If they're playing a game and keeping score, the intensity level is much higher (McChesney et al., 2012, p. 12). As a leader, how can you create this level of passion, concentration, and commitment in your organization?

The authors state that if you establish a wildly important goal and specify the lead measures that will help achieve it, you already have the makings of a winnable game. The next logical step is to develop a scoreboard that shows whether you're winning or losing (McChesney et al., 2012, p. 13). The scoreboard must be simple yet interesting. Teams should participate in the development of the scoreboard, and people should be able to glance at it and know the score. A simple scoreboard might show a runner bounding to the top of a staircase or a thermometer moving toward a specific temperature. The idea is not to overwhelm people with data, complicated charts, and confusing formulas. If the scoreboard is puzzling, people will not be as motivated to dedicate time outside of their whirlwind and engage with the initiative. However, if the scoreboard is clear and compelling, your team will be much more likely to participate and perform at a high level.

The fourth discipline is to create a cadence of accountability.
While the first three disciplines create the game (so to speak), the fourth discipline is where execution really happens. Creating a cadence of accountability means establishing a rhythm of regular meetings to assure that you and your team are staying focused on the lead measures and making progress toward the wildly important goal. These meetings don't have to be long; 30 minutes will usually suffice. During these weekly or bi-weekly check-in sessions, each team member— including the leader—should answer a simple question: What are the one or two important things I can do over the next 1-2 weeks (outside the whirlwind) that will have the biggest impact on the scoreboard? This is also a time for everyone to

report on whether or not they met their commitments from the last meeting (McChesney et al., 2012, p. 13-14).

The benefits of regular accountability are numerous. Holding one another accountable in this regard creates a culture of shared responsibility and ownership. Because team members commit to new tasks at each meeting, your organization is able to build momentum around your WIGs despite the constant presence of the whirlwind. The team also becomes more nimble because team members can make plans that adapt quickly to change. Teams that have a cadence of accountability are able to produce just-in-time execution plans that acclimate to new (and often unforeseen) obstacles and opportunities. And finally, these types of regular check-ins allow team members to see how their efforts are impacting results. When a team sees the connection between their work and the desired outcomes, this is when morale and engagement truly flourish (McChesney et al., 2012, p. 14).

The four disciplines of execution is a set of practices that hundreds of organizations and thousands of teams around the world have tested and refined. The authors of The Four Disciplines of Execution encourage us to think about the four disciplines as an operating system. Once you install it in your team, you can use it for any initiative you choose, but you need the whole system for it to work (McChesney et al., 2012, p. 19). The steps appear simple but implementation takes courage, engagement with your team, organization, and follow-through. Put simply, applying the four disciplines takes discipline, but the reward is being part of a high-performing team of people who know the goal and are determined to achieve it.

Now let's dig deeper into the four disciplines of execution by following our two professionals, Cindy Hay and Cindy Bea. We'll start with Cindy Hay, a struggling manager. Then we'll examine Cindy Bea, a more effective leader. As you listen to each account, consider how each professional achieves (or fails to achieve) the four disciplines of execution. Once both narratives are complete, I'll review key points for consideration.

Cindy Hay
Cindy Hay has just moved to town to begin work as an IT director for a college. She'll be managing six IT professionals who provide IT support for 95 faculty and staff and 700 students.

Here are the problems Cindy faces in her new role:

1. Cindy's IT team supports a large number of areas. They provide support for computer workstations, broadcast video technologies, and collaborative software platforms.

2. Cindy's team is struggling to keep up with the volume of tech requests entering their area.

3. The team's customer satisfaction score is 40%.

Here's how Cindy Hay approaches the situation: At a team meeting, Cindy Hay announces that their goal over the next year will be to improve their customer satisfaction score from 40 to 60%. She explains that a score of 80 to 90% would be more of a long-term goal. After all, Cindy doesn't want to set up the team for failure. By keeping the goal conservative, the team can hopefully achieve a small victory they can build upon.

Cindy also announces she'll use the next six months to get a better sense of how they can achieve this goal of reaching 60%. She'll need time to evaluate their current processes and determine an action plan to put them on the road to improvement. In her mind, she envisions creating a lengthy strategic plan replete with benchmarking data, dozens of team objectives, detailed action plans, and employee development plans for each team member. She also intends to submit a detailed proposal to her dean for a greater allocation of staff resources.

CINDY HAY: *Oh my! What have I gotten myself into? Turning this place around is going to put me into early retirement.*

After the meeting, Cindy types up her initial thoughts for the strategic plan. On her blank desktop, she creates a folder called "The Future" and drags her document into it. Sadly, this is one of the only times Cindy Hay spends working on this plan for the next year. She quickly finds that the culture of her new workplace is so fast-paced, that it's nearly impossible to keep up with the present (let alone think about the future).

A typical day for Cindy involves a flooded inbox of tech requests and a phone that never seems to stop ringing. Her computer desktop, which was once clutter-free, is now blanketed with folders representing the projects her team is juggling. When she's not handling her own crises, she's constantly being interrupted by team members who typically have questions about priorities.

TEAM MEMBER: *Hey, Cindy. I've got three fires to put out. The power supply on Dr. Paul's workstation just died, Dr. Gray's online webinar is having technical difficulties, and we've got tons of students who can't access an online lecture. Which one should I do first?*

Cindy holds team meetings but only when time permits. Getting together on a regular basis is impossible given the hectic nature of their work. Cindy was originally thinking she could meet with her team once a month. This could be a time to share news on their customer satisfaction score. However, because their numbers have barely budged, she's held off on sharing the score.

After a year of really long days, Cindy Hay is pleasantly surprised to see that her team actually did achieve higher marks for customer satisfaction. Their score jumped from 40 to 51%. While it's not as high as her goal of 60%, she chalks it up as a small victory nonetheless.

CINDY HAY: *Hmmm. I wonder if my leadership is what made the difference.*

Cindy Hay Debrief/Transition
While Cindy Hay's team did produce mild gains in their customer satisfaction score, they are basically performing at the same level they were a year ago. The team's work environment is highly stressful, and customers are still largely disappointed in the services they receive.

Now let's turn our attention to Cindy Bea. She and her team face the same challenges as Cindy Hay's team. Cindy Bea, however, will approach this identical situation by applying the four disciplines of execution. Let's see what difference this makes.

Cindy Bea
Cindy Bea recognizes that her new team will need to make some changes to improve its performance. They're supporting a large number of functions, they're having a difficult time keeping up with support requests, and their customer satisfaction score is 40%. Cindy Bea decides to engage her team in identifying solutions to these issues. During her first month on the job, she sets up an interview with each team member and asks the same two questions. First, what are our team's greatest strengths? And second, what are our team's greatest challenges? From these interviews, two main themes emerge:

1. The team's major strength is their technical expertise. They know technology better than anyone.

2. The team's major weakness is a lack of focus and commitment to customer service.

Cindy Bea calls a full-team meeting and presents these findings. She announces that their team's most important goal over the next year must be to improve their customer service efforts.

CINDY BEA: *This is a talented group, and I believe if we put our heads together and get focused on the right types of things, we can achieve a significant gain in our customer satisfaction score.*

She then asks the team to establish the score they think they can achieve in a year. The team settles on 75%. They agree that while this is not a great number, this will be a huge improvement over their current score of 40%.

Cindy Bea then asks a very pointed question.

CINDY BEA: *In addition to the work we already do, what are the one or two things we can also do on a regular basis that will have the biggest impact on improving our customer satisfaction score?*

After some brainstorming, the team determines that improving their response times will do the most to move the needle. Currently the average time it takes a team member to respond to an email or phone call is two business days. Support tickets often remain open and unresolved for 2 to 3 weeks.

The team agrees: *If we could cut these numbers in half, I bet we'd see a big jump in our score.*

TEAM MEMBER: *Well, that's easier said than done. The fact is we don't have a good system for prioritizing the requests we receive. And half the time, I'm not even sure who should be taking what...or who's doing what. That's why a lot of requests sit there for so long. We're all spread thin, and it's not always clear who should be taking what as we receive requests. Personally, I think we should divide ourselves into smaller, more specialized teams. I bet that would make us a lot more efficient.*

Cindy Bea agrees with this assessment and decides to assign two team members to each of their department's core functions:
- Team 1 will be responsible for workstation support.
- Team 2 will be responsible for broadcast video support.
- Team 3 will focus on collaborative software platforms.

Cindy will oversee all three teams and contribute in all areas when it's most appropriate.

Within a couple of months, the team begins to feel a bit more at peace with their work (and with each other). While everyone is still very busy, there is less stress and confusion around responsibilities and priorities. Team members start to show more ownership in their assigned areas, and communication becomes more streamlined among team members. Cindy holds brief, weekly meetings with each team member to check progress on projects and provide coaching and feedback. Cindy also makes bi-weekly team meetings a priority because she wants to make sure the team is being as effective as possible.

Cindy Bea is pleased that the team is becoming more efficient in general, but she wants to make sure they remain focused on how much time it takes to respond to requests and how quickly they're able to close tickets. After all, the team had identified that these two measures could have a big impact on their customer satisfaction score.

Cindy Bea decides to have some fun with this. Knowing her team members are huge college football fans, she creates a large poster that looks like a football field. She hangs it up in their meeting area and pins a picture of their school mascot on the 20-yard line.

CINDY BEA: *All right, folks. Here's how this is going to work. We made it our goal to cut our response times in half. This means on average we should be responding to requests within one business day. And we should be resolving issues in one week (on average). From now on, when we have a team meeting, I'd like us all to start by reporting our numbers.*

> • *First, how long did it take each of us to respond to the requests we received over the past two weeks?*
> • *Second, what tickets did we close over the past two weeks and how long did it take us to fulfill those requests?*

We'll compile our scores and come up with averages for both measures. If we hit our team goals, I'll advance our mascot 10 yards down the field. If we exceed our team goals, I'll move us 20 yards down the field. Here's the downside, though. If we miss our team goals, we go backwards 10 yards. And if we miss our team goals two meetings in a row, it's an automatic touchdown for our opponent. We'll call this other team, The Customer Service Destroyers!

The team gets a kick out of this approach and agrees that it'll be fun to track their progress in football terms. Cindy also explains that every three months, they'll look at their customer satisfaction score.

CINDY BEA: *If we're right about our response times making a big difference with our customers, we should start to see our score improve.*

Cindy begins to uses their regular check-in meetings to get reports on numbers. She also uses this as a time to have everyone on the team commit to tasks that can impact the scoreboard. The team struggles a bit during the first month to keep their commitments and hit their team goals. During the following two months, however, they begin to hit their stride. Team members not only begin to commit more focus to their own projects, but they also start working together to close out tickets in a more timely fashion. The team starts to sense a momentum around their work, and they feel like customers are reacting more positively to their services. At the end of three months, the group is actually eager to see their customer satisfaction score.

CINDY BEA: *Well, everybody. Six months ago we were at 40%. Today I'm proud to announce that we're at 61. And you know what? We've still got six more months to hit our goal of 75, and I bet we can do it if we continue to do good work, keep our commitments to one another, and also stay extra-focused on our response times*.

The team agrees. For the next two quarters, they continue to check in regularly, keep their commitments as best as they can, and record their numbers on their football field banner. At the end of the year, Cindy Bea is elated as she reveals their score: 82%.

The team is so excited about exceeding their goal they organize a football-themed potluck during a Friday lunch hour.

TEAM MEMBER: *Hey, you better watch your back, "Coach Cindy." We've got a cooler of Gatorade around here somewhere, and it's got your name on it.*

By applying the four disciplines of execution, Cindy Bea's team was able to improve their performance significantly. While Cindy Hay's team remained rather stagnant in their customer satisfaction score, Cindy Bea's team was able to "up their game" and more than double their score in a single calendar year.

Now let's investigate each discipline and see how Cindy Hay and Cindy Bea differed in their approaches.

1. **The first discipline is to focus on the wildly important.** Long story short: Both leaders hit the nail on the head when identifying the wildly important goal. Cindy Bea, however, realizes that achieving a goal requires it to be wildly important to everyone involved (not just the leader). For that collective buy-in to take place, a leader should solicit input from team members.

2. **The second discipline of execution is to act on lead measures.** Here we see an even greater difference in how the Cindies approach the situation. Lead measures are those actions that will create the most leverage in helping your team achieve its wildly important goal. Cindy Hay doesn't approach her underperforming team with this mindset. Rather than identify a small number of high-impact strategies that can help her team improve their customer satisfaction score, Cindy immediately assumes she'll need to create a colossal strategic plan. In her mind, Cindy equates her team's "big problem" with the need for her to create a "very big plan" replete with dozens of strategies, loads of actions plans, development plans for each employee, etc. Because the task of improving her organization seems so overwhelming, Cindy Hay gets consumed by the whirlwind of her daily affairs, and she is barely able to focus on the future. Instead, she gets trapped in the vicious cycle of surviving the present.

Cindy Bea, on the other hand, brainstorms strategies with her team. Together they determine that they can move the needle with their customer satisfaction score by getting extremely focused on three things. First, the team needs to be better organized around its core services. Second, the group makes it a mission to initiate contact with customers within one business day of their requests. And finally, the team puts enormous energy into closing out support tickets within a week. By keeping the list of lead measures short, Cindy Bea increases the likelihood that the whirlwind will not steal their focus.

Notice as well that these three strategies largely come from the team members themselves. Cindy Bea creates the space for a meaningful conversation to occur. She asks the million dollar question: "In addition to the work we already do, what are a few things we can also do on a regular basis that will have the biggest impact on improving our customer satisfaction score?" She considers the input from her colleagues and then communicates a course of action based on their ideas. This is an effective leadership strategy because people will always be more committed to strategies they help to develop than to orders or commands from management.

The third discipline of execution is to keep a compelling scoreboard.
Here Cindy Hay makes a common leadership mistake. She only focuses on their customer satisfaction score, which is a lag measure. Each time she reviews the score, the performance that produced the result is already in the past. Cindy Hay never identifies or tracks the key actions that will lead to an improved score. Instead, she is routinely haunted by a customer satisfaction score that barely budges.

Cindy Bea, however, chooses to track two lead measures:

- How long does it take us to respond to customers?
- How long does it take us to close our support tickets?

Because Cindy Bea tracks this information on a bi-weekly basis, the team remains focused on these important criteria. By presenting this information in football terms, the team can easily see if they are winning or losing. If they are advancing down the field and scoring touchdowns, this means they are executing on the strategies that should improve their customer satisfaction score. If they are not advancing down the football field and their opponent is scoring touchdowns, this means they have some work to do.

This football-themed scoreboard works for Cindy Bea's purposes. Did you notice, though, that Cindy Bea never engages her team in creating the actual scoreboard? This could have backfired. Luckily, her team was made up of football fans, so they appreciated the idea of tracking their leads measures in football terms. However, had there been one team members who knew nothing about football, this "compelling scoreboard" idea may have caused a lot of confusion. This, of course, would have defeated the purpose of having the scoreboard in the first place.

Remember: When it comes to creating a compelling scoreboard, it's important to engage your colleagues. Lead your group in coming up with an idea that communicates winning and losing in simple visual terms. This could be a hiker climbing to the top of a mountain. This could be a gator swimming from one part of a swamp to another. This could be a color-coded spreadsheet with fun icons to communicate progress and note key milestones. Maybe your scoreboard is series of flags ascending various flag poles. Tap into the ideas of your group. This will help assure that the scoreboard makes sense to everyone involved. It will also help to form an esprit de corps around the score. ☺

The fourth discipline is to create a cadence of accountability.
Cindy Hay fails to make regular team meetings a priority. She functions from the flawed premise that team meetings can only happen when she has enough time or when it's convenient. What Cindy Hay fails to realize is that she has to make time for these important meetings as opposed to waiting for these times to present themselves.

Cindy Hay falls into the dangerous pattern of prioritizing her schedule instead of scheduling team-based priorities. Team meetings should be a priority. Therefore she should be scheduling them to occur on a routine basis. She should also be holding her team members accountable for being present and engaged. Sadly, Cindy Hay gets consumed by her whirlwind and rarely finds time outside of it to

engage her team. Because there is no regular rhythm for team meetings, the group exists in a persistent state of being "off beat." For example, there is little clarity around what the team can do to improve their customer satisfaction score. Siloed team members work in a disorganized and frantic fashion. There is no evidence that team members are collaborating to close out tickets in a timely manner. There is no evidence that team members know if their organization is winning or losing. Ultimately, Cindy Hay does not foster a team environment and their performance remains stagnant because of it.

Unlike Cindy Hay, Cindy Bea holds regular one-on-one meetings with her direct reports and regular team meetings. Most notably, Cindy Bea uses her team's bi-weekly team meetings to keep her colleagues focused on improving their customer satisfaction score. At each team meeting, she tracks their two lead measures. Are we responding to customers within one business day? Are we closing out our support tickets in one week? She also uses group meetings as a time for all parties to commit to tasks that can impact the scoreboard. As a result of this cadence of accountability, expectations remain clear throughout the year. The team becomes more nimble and responsive to unexpected challenges they encounter. Team members become more supportive of one another's efforts to ensure their team averages remain high for their lead measures. Cindy Bea keeps the team focused on their scores for both lead and lag measures. Therefore, the team has a continual sense of whether they are winning or losing.

Ultimately, Cindy Bea creates a culture of communication, collaboration, and accountability that drives results. Her team functions effectively and customers are largely satisfied with the service they receive. Their customer satisfaction score moves from 40 to 82% largely because of Cindy Bea's focus on discipline #4. Remember: Disciplines 1, 2, and 3 create the game (so to speak). Discipline 4 is where execution really happens. By creating a cadence of accountability, Cindy Bea refuses to allow the whirlwind to rob her team of the focus and energy necessary to achieve their desired results.

Conclusion

I hope you've enjoyed this podcast on The Four Disciplines of Execution. As you can see, applying the four disciplines can make a big difference in a team's ability to achieve results. While the stories of Cindy Hay and Cindy Bea are fictional, the hope is that by juxtaposing these two true-to-life narratives, you can clearly see the powerful impact the four disciplines of execution can make in a team's performance. The narratives are provided for illustrative purposes only and are not meant to represent a particular person or organization.

To recap, the four disciplines are:

- Focus on the wildly important
- Act on lead measures
- Keep a compelling scoreboard
- Create a cadence of accountability

To dig deeper into these strategies for success, I encourage you to read the book, The Four Disciplines of Execution. The book features various real-life examples of organizations implementing the four disciplines to achieve superb results in business, government, and higher education.

Thanks for listening. Best of luck and take care.

References:

McChesney, C., Covey, S., & Huling, J. (2012) The Four Disciplines of Execution, New York: Free Press