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# Worth Talking About: Assessing Operational Focus & Alignment

## 5 Tips for guiding an effective team offsite

By Mike Gospe

As the summer winds down, it's common to find executive teams reviewing and assessing their corporate and departmental objectives and goals as they plan for Q4 and next year.   The biggest challenges these teams face may not actually be related to the business, per se.  Instead, it's in their ability to carve out quality time to gather the team to conduct a thorough assessment and come away with meaningful, relevant, and agreed upon priorities.

Leaders and managers report that they spend a significant amount of time in meetings which are poorly run and do not produce meaningful results. It doesn't take many of these ineffective meetings to derail internal processes, stagnate decision making, and frustrate employees and managers. The best way to avoid this pitfall is to structure meetings using some proven facilitation techniques that will keep the team focused, constructive, and on track.

**Driving focus with an assessment technique**

Whether you are a CEO with a team of veterans, a new VP of sales needing to quickly familiarize yourself with the sales organization, or a marketing team leader who has newly expanded responsibilities, the assessment technique will help you guide the discussion, capture and align the issues.

The following 2x2 matrix technique allows for flexible discussion and discovery within a proven structure.  This structure allows the team to categorize their input into four areas:

1. **Sustain:** What business practices or tasks are working well today and should be maintained?
2. **Turn-around:** What operational tasks are broken and require some major re-work?
3. **Re-alignment:** What tasks are we doing that need some minor tuning?
4. **Start-up:** What aren't we doing that we should be doing?


The output of an example assessment is shown in the illustration.  During a recent offsite a marketing leadership team performed a frank assessment and prioritized the insights that are captured in the template. Action items were then identified and assigned to owners. The team will be reconvening next month to update each other on the progress and confirm the metrics and measurement for a successful Q4 and next year.

**5 steps to using this assessment approach**

***Step 1: Set ground rules***

Begin by setting clear ground rules that will help focus the discussion to be constructive, action-oriented, and centered on elements the team members control. Some examples of helpful ground rules:

- Tell everyone to turn off cell phone ringers to avoid distractions. Laptops, cell phones, texting, etc. are not allowed.
- Allow for plenty of breaks so people can stay in touch while not disrupting or missing part of the discussions.
- Focus the discussion on items the team can control. When the conversation focuses on blaming outside forces, capture the issue on a "parking lot" flip chart, and then move back to what the team can directly control. Avoid the "blame game."
- Balance the discussion. Ensure that everyone has a chance to be heard. If a team member is controlling too much of the conversation, thank him for his contribution and invite others to share their thoughts. Call on folks who may be sitting quietly.

***Step 2: Clarify the context***

While there can be an unlimited number of items the team may want to discuss, it's important to clarify what context the team should be focusing on. As such, it is helpful to ask the team to consider three pillars that affect operational success:

1) **Processes:** formal or informal processes used to get quality work done
2) **Plans:** physical documentation, presentations, or other deliverables used to communicate with and align teams in order to achieve business goals and objectives
3) **People:** skill sets of existing staffs, staffing levels, outsourcing considerations

***Step 3: Begin in a positive direction***

Instead of starting the conversation on the negative, focus on what is working well. Identify strengths of the organization and acknowledge the best practices already in place. Capture this input in the **Sustain** category.

***Step 4: Invite critical (but constructive) thinking***

With a foundation set for what is working, next dive into the ***processes, plans, people*** issues that need some attention. As the group raises an issue, first focus discussion to clearly define it and where the issue fits: **Turn-**

**around, Re-align, or Start-up**.  Do NOT focus on problem-solving during this discussion.  Problem-solving will happen later, after the offsite/workshop.  The focus here is to clearly define and describe the issue and its implications for the rest of the business.  (Note: Step 4 will require the most time on the agenda.)

***Step 5: Prioritization and Action Plans***

It's not enough to identify issues and call it a day.  As a final step, ask the team to review all of the issues captured and then prioritize which ones require immediate attention.  You can use a common voting technique to help (e.g. if 20 issues are captured on flip charts around the room, give each team member votes to indicate their top 3 priorities.  Tally the results and summarize the meeting with a "first things first priority list."  For those few items identified as priorities, spend a few minutes to drill down on each, asking for specific next steps and owners.  Document these action plans as part of an executive summary that will be distributed to the group in the few days after the exercise.

## Getting started

Depending on your need, you may want to hire an outside expert to work with you to design and facilitate an effective, energizing offsite or working session.  Or, you might be interested in holding your own team offsite, or a series of shorter working sessions.  Either way, this structured operational assessment approach should serve you and your team well.   For questions or tips on how to structure the most effective "working session" offsite for executive staffs, sales teams, or marketing teams, feel free to contact Mike Gospe or visit Mike's Marketing Campaign Development blog for more information.

## About the Author

*Mike Gospe leads KickStart Alliance's marketing operations practice where he conducts team-based "practical application working sessions" to improve the effectiveness of lead generation campaigns and product launches. His fun, practical approach and roll-up-his-sleeves attitude energizes teams, helping them to get "real work done" while guiding them to the next level of excellence. Mike is the author of the book, Marketing Campaign Development, and his methodology is being used by San Francisco State University's College of Extended Learning course: "Essentials of Integrated Marketing."*