

Leveraging a Strategy to Execution Framework: A Journey of Transformation



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KaiNexus is the solution for your Lean and Improvement work where teams can capture, implement, measure, and share in one system that does it all.

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A little about Karen Friedenberg



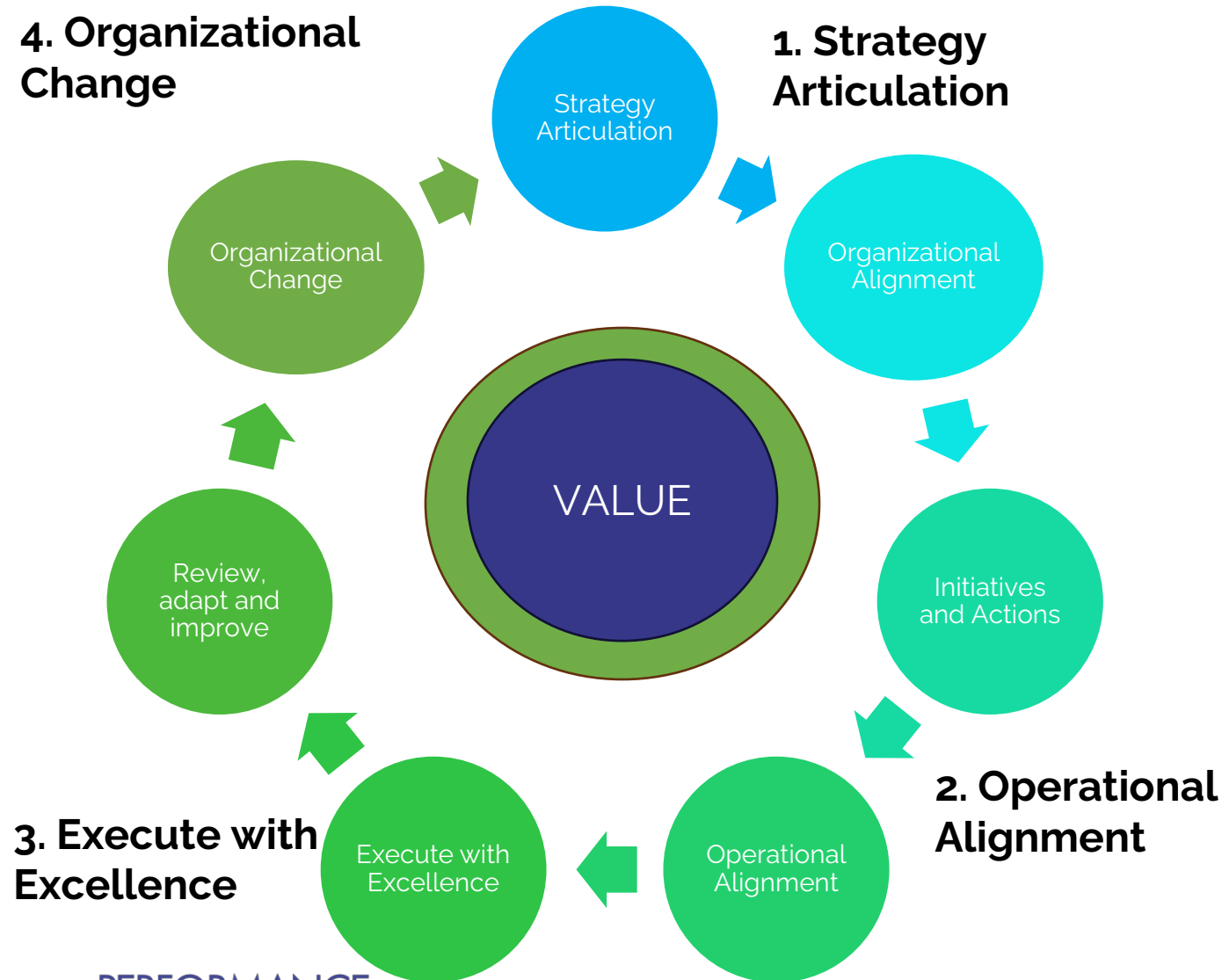
- Founder and Managing Director of Performance Improvement Consulting. Facilitating mid-sized companies from Strategy to Execution.
- Worked both in large Management Consulting and within various industries such as consumer products, retail, transportation and Software (SaaS)
- Built out several Strategic Program Management Offices and Operational Excellence departments
- Led multiple business and digital transformations of all sizes
- Lean Six Sigma Black Belt and Prosci Change Management Certified



Strategy to Execution Framework KaiNexus Webinar July 23, 2024



What is the Strategy to Execution Framework



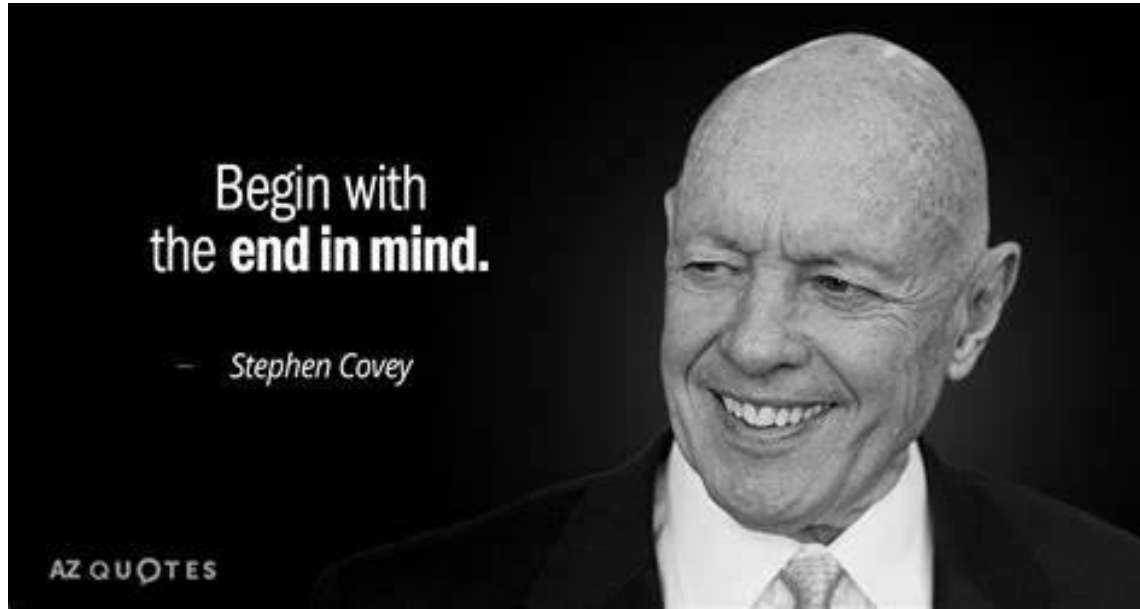
- Approach designed to help organizations effectively implement and achieve their strategic objectives to achieve sustainable results
- Framework to assess where there are gaps and where need to improve
- Ensure execution is tied to strategy
- Incorporate People and Culture Change - Crucial

Journey of Transformation – A real-life example

- Private Label manufacturer faced with mounting pressure to improve contribution margin and overall profitability
- Wholesale end to end Strategic Transformation including Culture Change, Operational and Financial Improvements



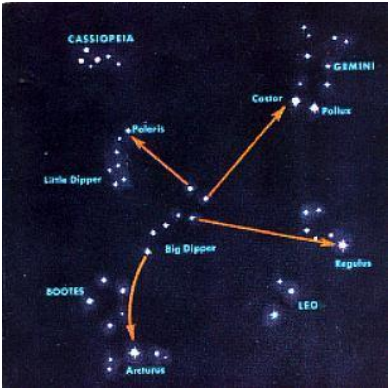
Step 1 – Strategy Articulation



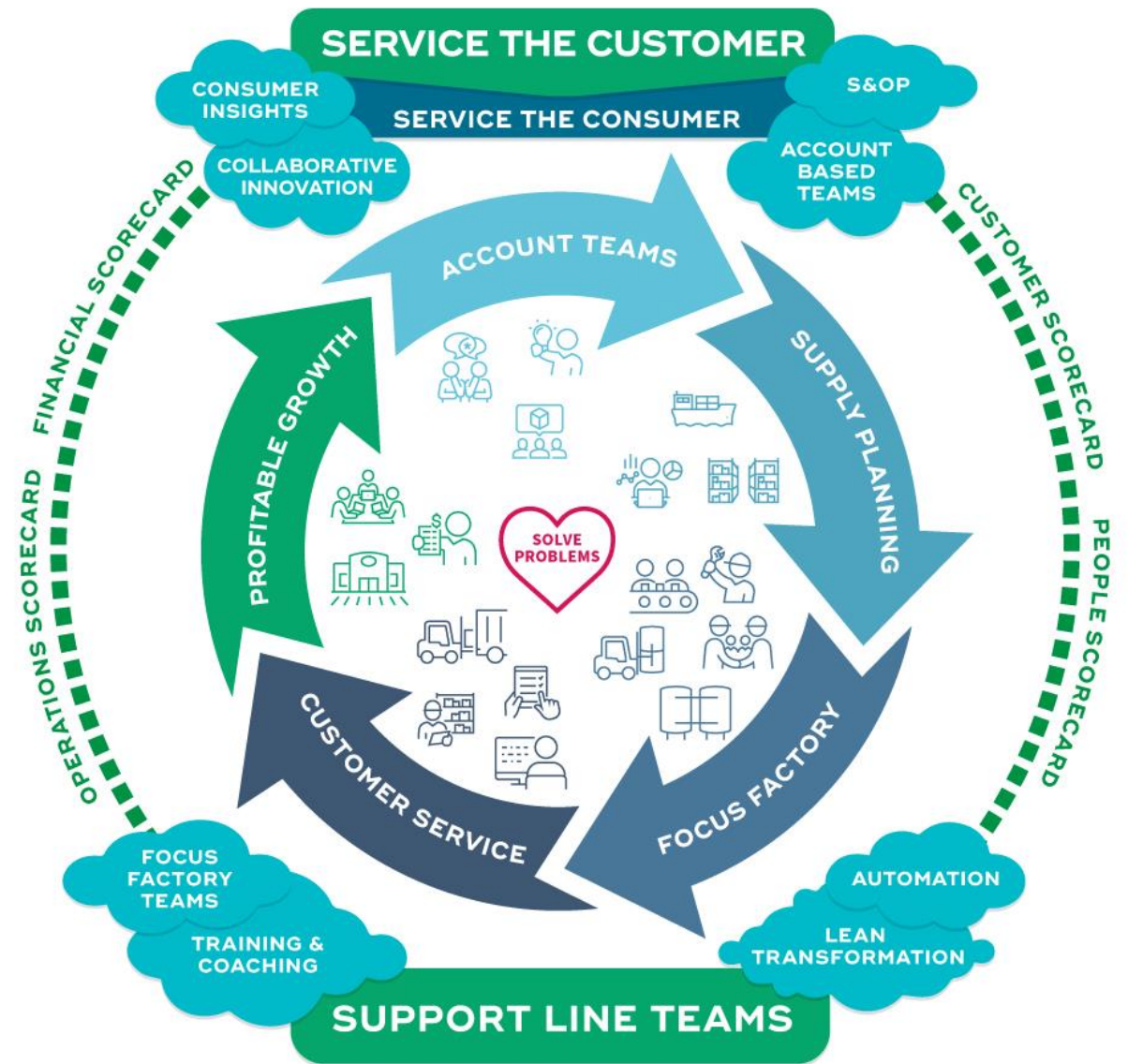
- Is your strategy - mission, vision, values and purpose clear?
- Does the next level of strategy exist and has it been clearly communicated?
- Do business units and departments have a strategy aligned to corporate strategy?

A picture is worth a thousand words...

- Using design thinking techniques – getting the team to build the picture of where the company and their departments are going



What is your North Star?



Developing the Culture

- Videos to set the stage for a culture of transformation – changing the way people think
- REINFORCEMENT
Communicate, Communicate, Communicate



Good leadership is a network, not a hierarchy

- Leadership is a Network, not a hierarchy
 - **Complex problems require leadership by many, not a few**
 - It provides personal growth opportunities too!
 - Leadership is *not about giving answers*, it is **asking questions**



You don't like it? You can't fix it. You can't fix it.

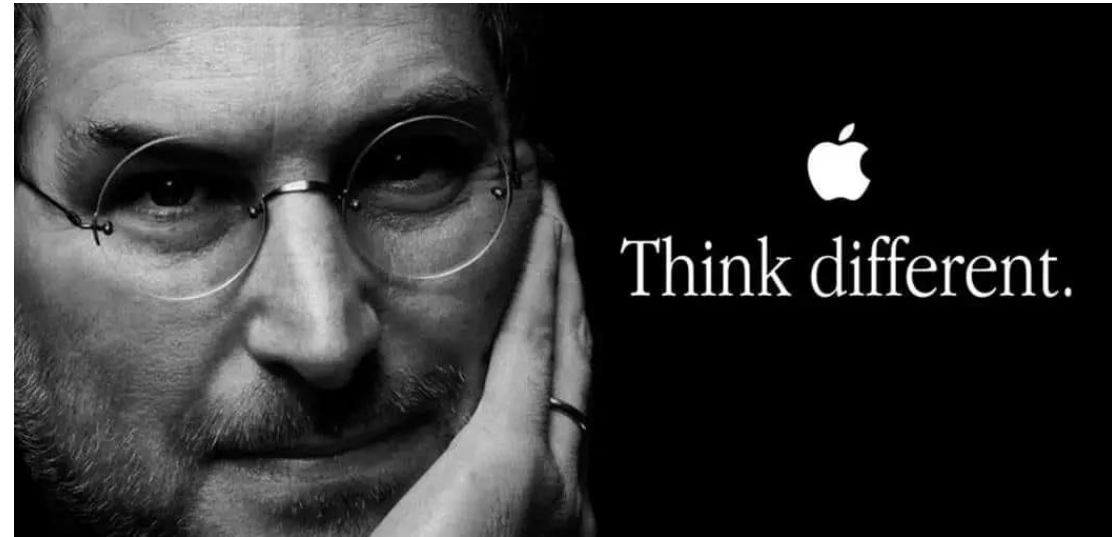
- Leaders focus on Micro-Battles to “get stuff done” – Test and Learn
 - Bite size pieces – takes away the fear
 - **Leadership listens**, then supports change & learning
 - Test & learn, figure out “how to win” then scale

Getting people to Think Differently



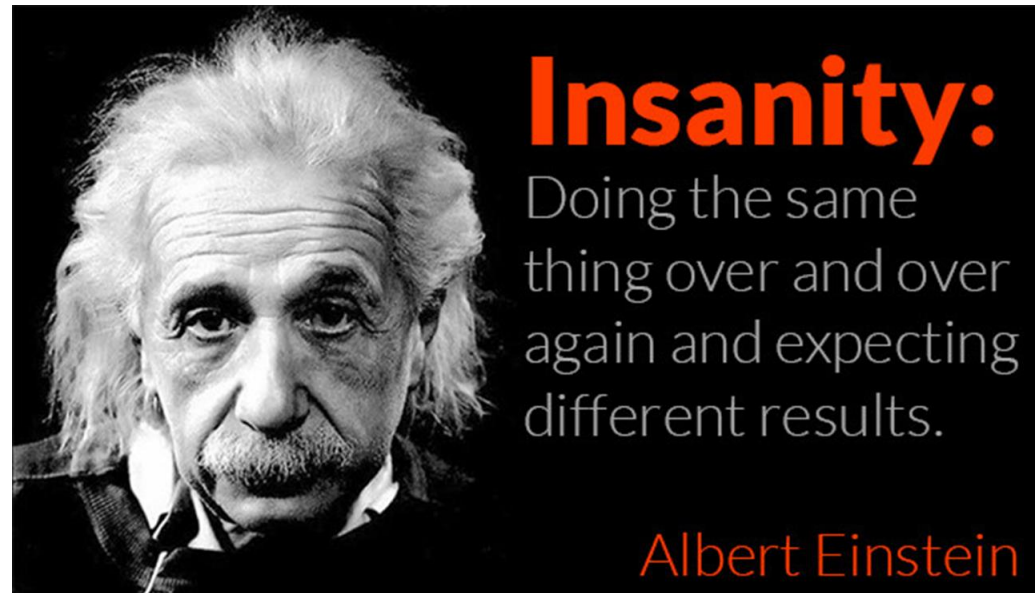
Stories

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Videos

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Quotes

Drilling down into Objective, Initiatives and Measures

Strategic Objectives

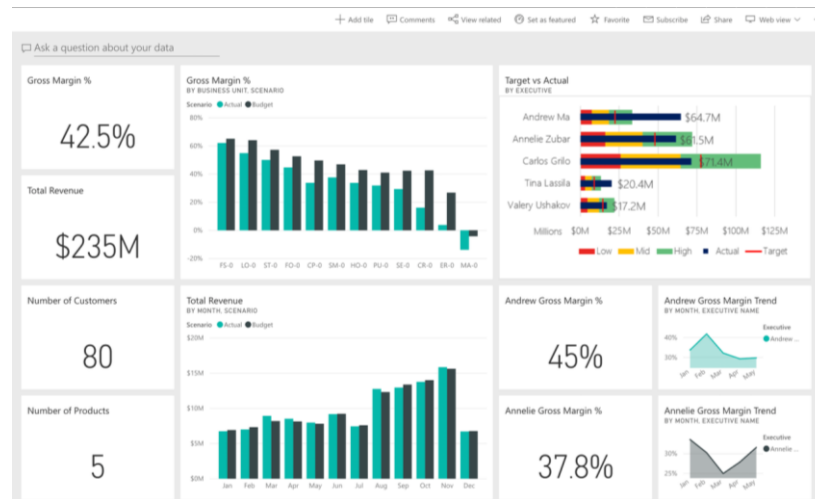
- Customer Service
- Profit Margin target
- Sales Growth

Detailed
Visions by
Department
that supports
the company
vision

Strategic Initiatives

- S&OP
- Lean Transformation
- Strategic Growth
- Training and Coaching Program
- Automation

Metrics and Dashboards



Organizational Alignment

Organizational Alignment

Commercial

Operations

R&D

IT

Finance

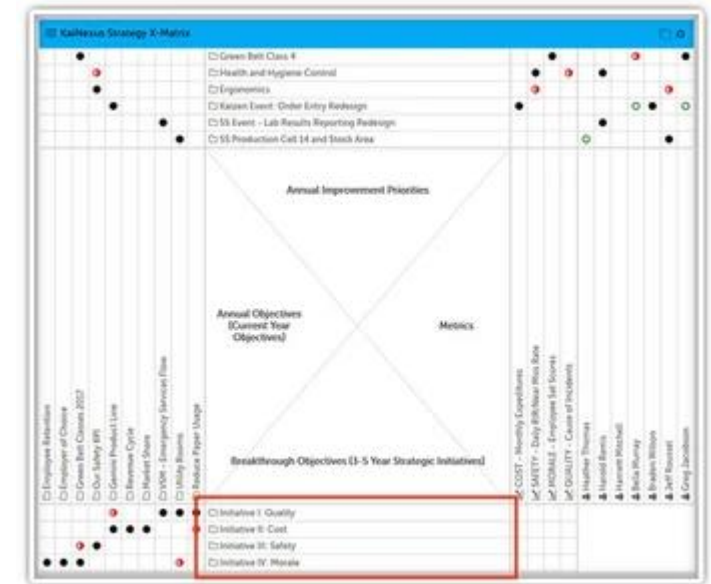
HR

Different ways of doing this - OKR, X-Matrix, MBO, Plan on a Page – Aligned across the organization

Objectives – From C-Suite to individual contributors and back again

Key Performance Measures – At the company and department level

Accountability – Who wears the jacket?
Inter-dependencies between teams to be successful



Use of OKR to align strategy to execution

An **OKR** is a goal-setting framework.

Objectives describe what an organization aims for, while **Key Results** track progress with specific milestones.



- Alignment of goals across the company
- Goals will support the metrics captured
- Transparency to goals
 - Showing impact of everyone's contributions
 - Celebration for goal achievement
 - Adaptable to pivot when needed
- Feedback loops
- Development for professional and personal growth

Now it is time for the how

Initiatives
and Actions

Strategic Initiatives translated into Programs

Transformation Management Office – The orchestrator – ensures the company's efforts are aligned to the strategic goals and executed effectively

Strategic Initiatives defined and prioritized – Force Rank by value and alignment to strategy

Projects defined and translated into actions that are tracked - How will the strategic objectives be orchestrated?

- Projects
- Initiatives
- Kaizen Events

Impact of initiatives are measured to allow for performance monitoring

Driving a culture of accountability and collaboration

Operational Alignment

Operational
Alignment

Are processes and operations consistent and aligned?

Problem may be stated during strategic planning – issue with delivering product on-time to customers...

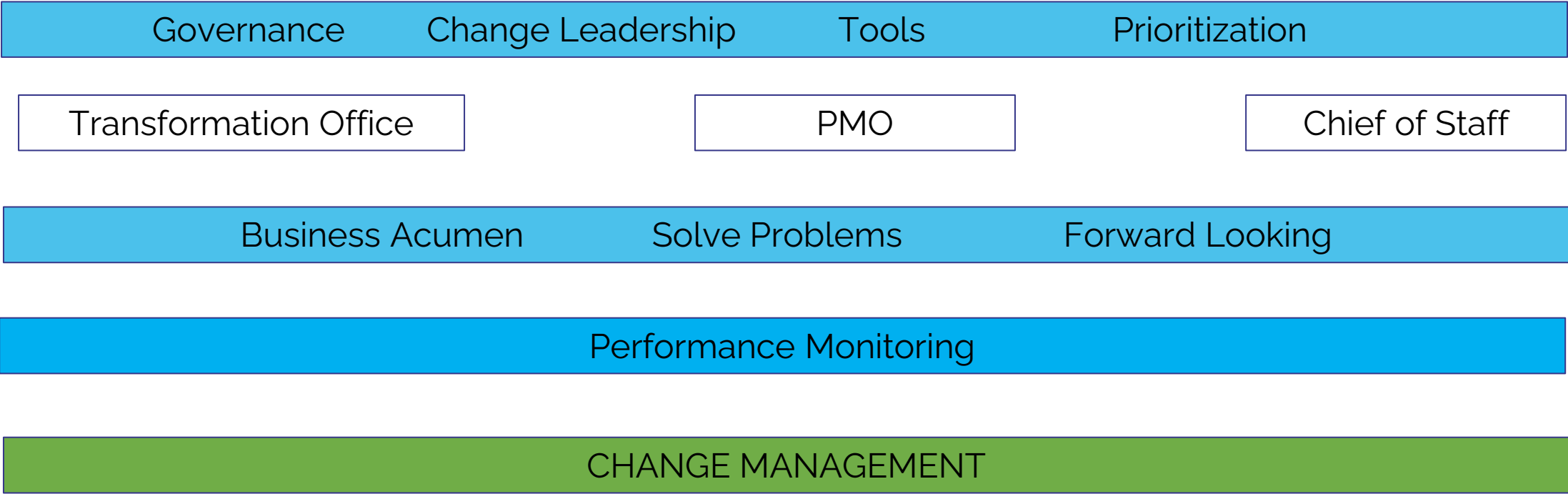
- Why?
- This is where Process Improvement comes in!



Project and strategy execution

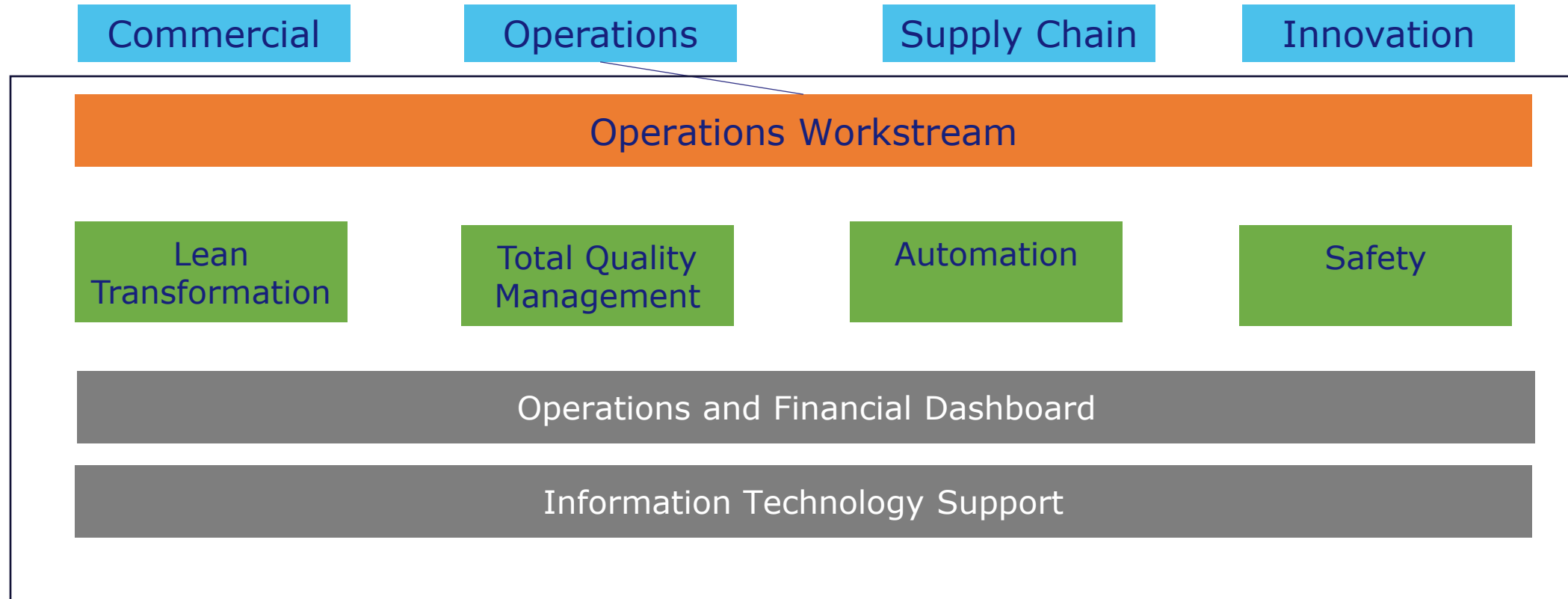
Execute
with
Excellence

- Who is responsible for managing the execution of the strategy?
- Is there a person or department that is tracking status, roadblocks and helping to prioritize and orchestrate?



An example of how to structure a Transformation

Workstreams



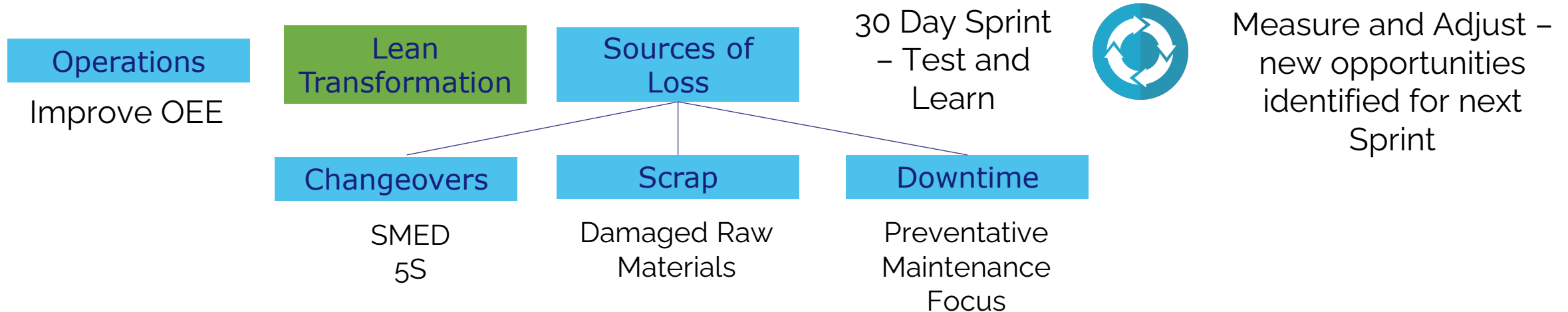
Tracking of initiatives by week at Workstream meetings

Strategy Execution – Not one and done!

Review,
adapt and
improve

- The use of scorecards and keeping an eye on changing business landscape – either internally or externally. The plans may change but the objectives don't.

Example of using an Agile Methodology to be able to pivot and adjust



Bringing people along for the journey

Organizational Change

Prosci ADKAR

Awareness

Desire

Knowledge

Ability

Reinforcement

Communication and Coaching

Training and Coaching

Celebrating Wins

Culture Change

Prepare for Change

- Understand the scope of change
- Communicate
- Gather employee feedback & suggestions

Manage Change

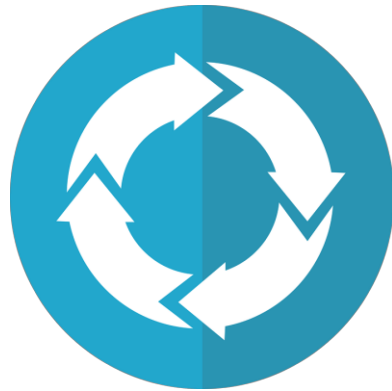
- Tools and resources
- Training
- Coaching & feedback
- Communication
- Resistance Management

Sustain Outcomes

- Adapt and Adjust
- Celebrate the wins!
- Measure progress against expectations
- Reinforce behaviors

"Test and Learn" – Getting people comfortable with change and making mistakes

Test and Learn



Continuous Improvement

The oval table - Collaboration



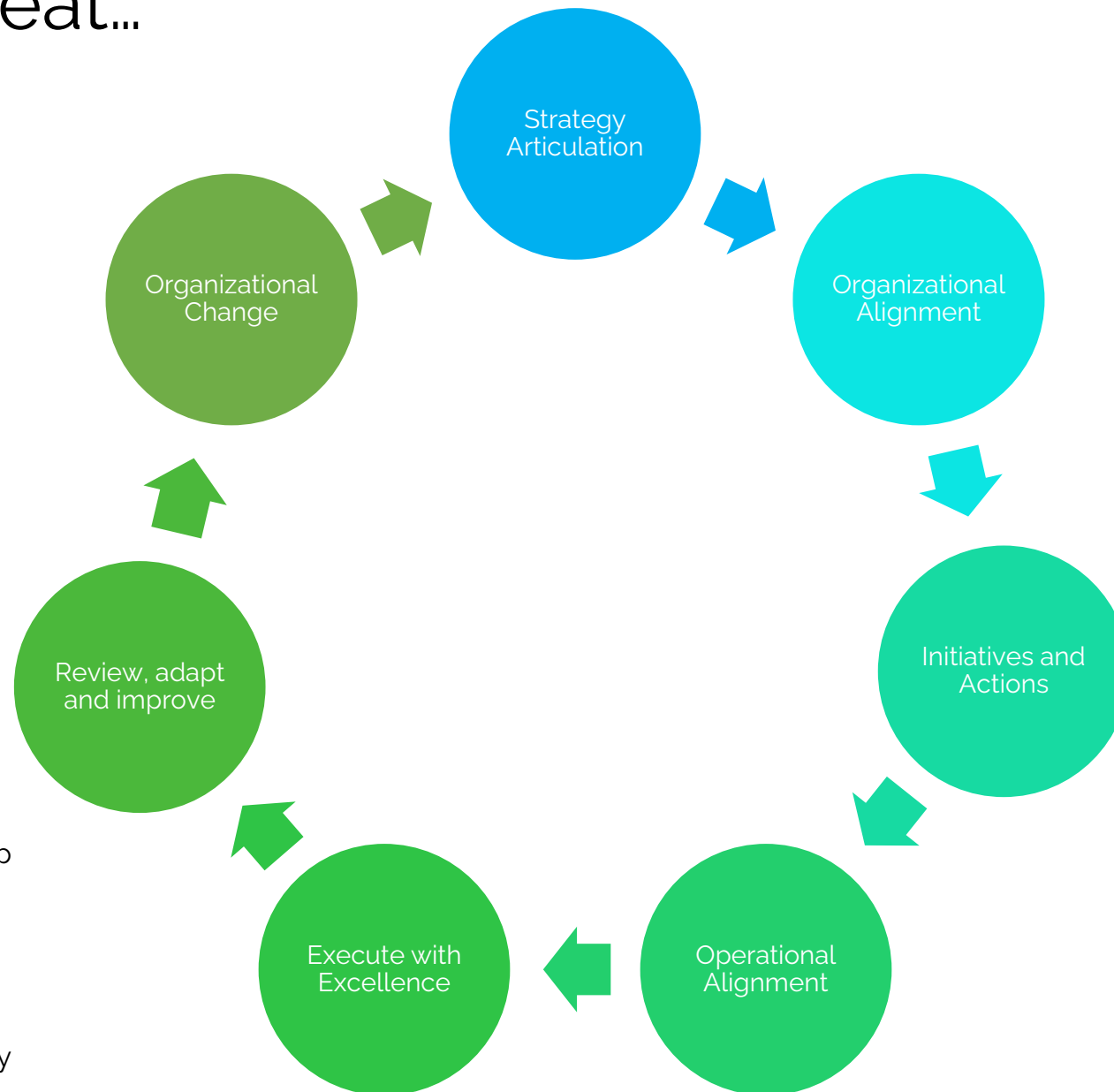
Leadership as a Network

"make small mistakes early, learn, adjust, and succeed." Mark Graban, *The Mistakes That Make Us*

Rinse and Repeat...

4. Organizational Change

- Does leadership set the tone and see strategy execution as their job?
- Is the culture driving performance improvement?
- Are people prepared for change?
- Is there a method in place to ensure change is sustained?



3. Execute with Excellence

- Is prioritization and ownership clear?
- Is there a method for project and strategy execution management?
- Do you have a method to monitor and improve strategy and processes?

1. Strategy Articulation

- Is your strategy - mission, vision, values and purpose clear?
- Is your leadership team aligned?
- Has it been communicated in a clear and powerful way?
- Do business units and departments have a strategic plan aligned to corporate strategy?

2. Operational Alignment

- Do you have a plan of HOW your strategy will get executed?
- Has your strategy been translated into objectives, KPI's and Projects?
- Are processes and operations consistent and aligned?



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THANK YOU

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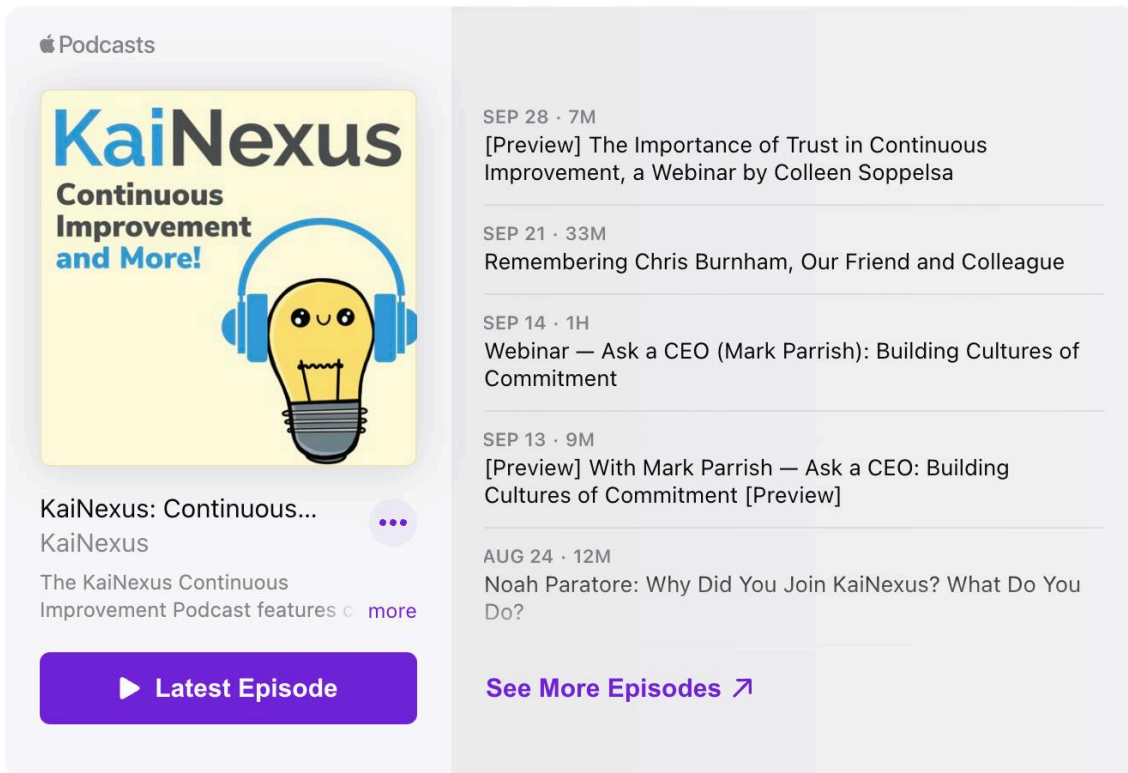
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Q&A

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