

Establishing a Thematic Goal Roadmap

Purpose of Exercise

This guide is intended to provide you with an overview of the process for establishing your Thematic Goal.

I. Introducing the Model

To avoid politics and turf battles, leaders must establish a rallying cry a single overriding theme that remains the top priority of the entire leadership team for a given period of time. In turn, this rallying cry or “thematic goal” serves to align employees throughout the organization and provides an objective tool for resetting direction when things get out of sync.

While it is useful for companies to have both a long term vision and a set of short term, tactical objectives, the thematic goal is intended to bridge the two. It makes the vision more tangible and it gives the tactical objectives more context.

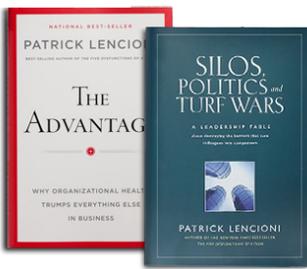
For the thematic goal to take root in an organization, it needs to originate at the executive team level. Once the thematic goal is set for the organization, each department can then create a corresponding thematic goal.

II. Definitions

Thematic Goal: A single, qualitative focus or rallying cry that is shared by the entire leadership team — and ultimately, by the entire organization — and that applies for only a specified period of time.

Defining Objectives: The temporary, qualitative components that serve to clarify exactly what is meant by the Thematic Goal; shared by all members of the team (and usually varying in number from four to six).

Standard Operating Objectives: Other key objectives that an executive team must focus on and monitor. These objectives do not go away from period to period and often include topics such as: revenue, expenses, customer satisfaction, quality etc.



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III. The Thematic Goal Model and Exercise

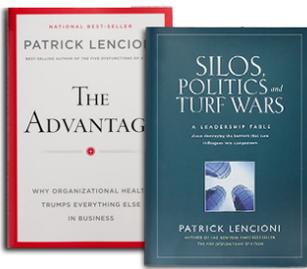
Completing the model is a three step process:

1. Select the thematic goal for the organization (further instructions follow)
2. Further define the thematic goal by determining the 4-6 critical actions required to make the thematic goal tangible
3. Highlight the other standard, day-to-day activities that must continue in your organization regardless of the thematic goal

After completing the steps and exercises outlined in this tool, you should be able to establish your team's thematic goal. This exercise is best done on a flip chart or white board.

Thematic Goal Exercise

1. Ask every member of the team to individually answer this question: "What is the single most important thing that we must get done this period in order for us to succeed?"
 - Team members write their responses down privately. It is important that the participants write out their answers so that their ideas are not biased by what their peers may have said before them.
 - Estimate a timeframe for the Thematic Goal. Since the timeframe for varies depending on the situation choose one as a starting point. We usually begin with 6 or 9 months.
 - Answer some supplemental questions. The following phrases may help clarify your Thematic Goal:
 - a. "If we don't accomplish _____, we will have failed."
 - b. "If we do not _____, our organization will suffer significant risk."
 - c. "What is the most important thing we need to accomplish this period?"
 - Engage in debate over the goal. Team members may push back and suggest that there are many other things that have to get done and that the organization "can't afford to focus on just thing." When hearing this objection, keep in mind the phrase, "If everything is important, than nothing is."



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Thematic Goal Exercise (Continued)

2. Once everyone has committed to something on paper, go around the table and ask each person what they listed. Capture each person's suggested Thematic Goal on a flip chart or white board.
 - To ensure everyone does not hold back, we suggest that the leader of the team go last.
 - Be sure to write every unique goal down and ask any clarifying questions when necessary. Indicate which goals have been suggested by multiple team members.
3. Have the team review the list.
4. Use the following questions to determine which suggested goals might be better categorized as a Standard Operating Objectives.
 - "Is this something that is always important?"; "when are you not worried about that?"; "how is that different than last period, or next period, or next year?"
 - Tell the group, "remember a Thematic Goal is in place only for a specific period of time, and then it goes away. If it is something that is always important, and that you always worry about, it's more likely than not a Standard Operating Objective."
5. Ask the team to again review the list and try to identify which goal really rises to the top as the most important.
6. If there are still some discrepancies, ask team members to take 60 seconds to convince the team why their suggested goal is most important.
7. Ask the team to consider which of the goals on the list are truly candidates for the Thematic Goal, and which may simply be a Defining Objective of that goal.
8. Have the team put a stake in the ground and choose one for the Thematic Goal.
 - If the group is stuck, it may be appropriate at this point to push the discussion forward (sometimes discussing the Defining Objectives helps to further clarify the Thematic Goal or to even re-frame it)
9. Write this Thematic Goal in a box at the top of a new Flip Chart.