Institute For Enterprise Excellence

Bringing Purpose To Life

A Pracademic’s Guide to Strategy Deployment

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Executive Summary:
Our first White Paper “Foundations for Transformation: Linking Purpose, People and Process”\(^1\) described the common patterns that we have observed as executives and managers have attempted to create a culture of continuous improvement in their organization. Many find themselves trapped in a cycle of “program of the month” approaches that never seem to produce the sustainable transformation of management that is necessary. However, there are some who desire to break away from this pattern and wish to switch the direction of their efforts by understanding the power of purpose, as well as learning and practicing new principles of management.

In our fourth white paper “One Approach to Deploying a Purpose and Principle-Driven Transformation”\(^2\) we share our current thinking about “deploying a cultural transformation” based on the knowledge and contributions of many thought leaders, as well as observing patterns in organizations from many industries that are attempting and succeeding at a cultural and management transformation. One element of this deployment model is the “design and redesign of key systems.”

One of the key systems that will need to be in place is a strategy deployment system. Why is this so? Managers can try to better engage and enable their employees improve their work, but that does not necessarily mean they are improving the right things. It’s possible (and in our experience fairly common) for people to spend time improving systems and processes that are not adding value to their customers and are not helping to make the company relevant in the market. A strategy deployment system can help increase the likelihood that people are improving the right things. The purpose of this paper is to share some of the observations and lessons learned in the creation and use of this important system.

We are indebted to a number of fellow “pracademics” who helped to share their experiences, thoughts and insights in this paper: Roderick Baker, Glen Barfknecht, John Collodora, Susan Frank, Jeff Hebbard, Jeff Hunter, Paul Leao, Dale Lucht, Ann MacDonald, Bob Mayfield, Paul Olsen, Tim Pettry, Scott Powell, Holly Prast, Tyler Pulkrabek, Didier Rabino, Dan Robertson, Lisa Radtke, Ajay Raikar, Dave Rooney, Seth Rossow, Sid Srinivasan, Dirk van Rossum, and Linda Wadewitz.

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I. What is a “Pracademic?”
Before we describe some of our lessons learned around strategy deployment, we’d like to explain what we mean by a pracademic. The term “pracademic” was coined by IEX Founder and President Jacob Raymer to describe a person who understands and uses theory, but also understands the practical application of theory. Figure 1 depicts this with the often-used iceberg metaphor to demonstrate what we see “on the surface” (tools, methods, results, behaviors) and what is “under the surface” (processes, systems, principles, bodies of knowledge). A pracademic tries to reside at the “water line” by continuing to learn and refine theories, but also relating these to real-life application. A similar term for this is “praxis” – the exercise or practice of an art, science or skill. Toward this aim, we will insert some final comments regarding “the practical benefit” at the end of each of the ten key lessons described in Section III.

II. What is “Strategy Deployment?”
Figure 2 illustrates a common view in many organizations. Step 1 of the process - develop a strategy. This often includes a series of strategies that are updated every 2-4 years. Step 2 of the process is executing (or deploying) the strategies. In many organizations the deployment step is limited to “communication.” This is the old mental model of organization as biologic being, and senior leadership as the brain sending out signals through the nervous system. Everyone is supposed to know what to do. This can also be attributed to the old expert-based consulting model, rather than Schein’s paradigm of humble consulting.

The strategies may sometimes be described as “breakthrough” strategies which implies something radically different from the current work focus. One example of breakthrough strategies is Toyota’s decision to build the Prius (hybrid gas/electric) automobile. Another example was the development of digitized photography by replacing the use of film and film developing. Another way to think of this is asking for “breakthrough performance” others have described this as “stretch goals.” These breakthrough goals may help to drive or create the breakthrough strategy. Using the hybrid car as an example, if the goal had been to increase gas mileage by 2mpg, engineers may have responded with small incremental changes, like aerodynamics of the car, or reducing the weight of the car. However, since the “breakthrough” was to increase by 20mpg, this goal asks for a whole new level of thinking. It is difficult (if not impossible), to incrementally get a 20mpg improvement, so your mind set shifts to something like combining electric and gas, not just aerodynamics or the car’s weight. This creates a “breakthrough strategy.” On an X-matrix (page 4), this is why you start with setting the desired outcome first, then identify what priorities or strategies would be able to achieve that outcome.

Figure 3 illustrates an emerging view in organizations where the strategies are coupled to a continuous improvement system. We sometimes see the development of three interdependent systems (one is “strategy deployment” the others are strategy development and daily management (also called “managing for daily improvement”). We discussed this emerging view in our tenth white paper “Side (by Side) Management.”

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4 Edgar Schein, Humble Consulting, 2016
5 Personal correspondence with Jeff Hunter
6 Personal correspondence with Seth Rossow.
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Strategy deployment is also known as policy deployment or in Japanese terminology “Hoshin Kanri” or Hoshin planning. Hoshin Kanri means, “direction management” and the metaphorical definition “Ship in a storm going in the right direction.” Breaking the wording down further, we learn that: Ho = direction, Shin = needle, Kan + control, or channeling, and Ri = reason, or logic. The few key strategies are often referred to as “hoshins.” Hoshin planning assumes you have done the work to determine what the direction should be...chosen among alternatives. When reading most books about strategy deployment, Chapter 1 would be about selecting the hoshin and Chapters 2-15 would be about deploying it. In our translation of hoshin planning into strategy deployment, the concept of strategy was lost in translation.

If we break down the definitions of strategy and deployment, we might learn the following:

**Strategy** – “a high-level plan to achieve one or more goals under conditions of uncertainty.”

**Deployment** – “to spread out, utilize, or arrange for a deliberate purpose.”

Deployment is not the orchestration and implementation of a detailed plan. It requires a shift in the way organizations operate, from a mindset where management knows best, and tells employees what to do without thinking or asking questions, to one where they propose direction and ask for feedback and inquiry. Instead of assuming that managers know the right answers as a fact, the deployment of strategy assumes that any suggestions are simply opinions to be explored and challenged. Employees are allowed, and encouraged, to think for themselves, allowing for the possibility that they may turn out to be wrong, and making it acceptable for people to change their mind. Deployment goes beyond mere communication, and means total involvement by everyone in the organization, not just top management.

Here are three definitions that might be useful:

1. Strategy deployment is any form of organizational improvement in which solutions emerge from the people closest to the problem. It has also been described as the communication of the agreed upon strategy to those who will implement the change, often those closest to the problem or opportunity the strategy is addressing. More specifically, it is the creation of a high-level plan for organizational improvement under conditions of uncertainty (the strategy), and the utilization of that strategy by employees for a deliberate purpose (to achieve one or more goals). Clear communication of both the goals and the strategy, and constant collaboration across the whole organization to use all the skills, knowledge and experience available, allows the appropriate tactics to emerge. In this way strategy deployment enables autonomy of teams and departments while maintaining alignment to the overall strategy and goals. Strategy deployment is not a specific method, or framework, but more as general approach or style.

2. Strategy deployment is a management process that aligns—both vertically and horizontally—an organization’s functions and activities with its strategic objectives. It includes a specific plan, typically annual, that is developed with precise goals, actions, timelines, responsibilities, and measures. Strategy deployment may start as a top-down process when an organization launches a lean conversion. However, once the major goals are set, it should become a top-down and bottom-up process involving a dialogue between senior managers and project teams about the resources and time both available and needed to achieve the targets. This dialogue often is called catch ball (or the Japanese term “nemawashi”) as ideas are tossed back and forth like a ball. Some organizations include catch ball process in the “strategy development” system which occurs prior to strategy deployment. The objective is to match available resources with desirable projects so that only projects that are desirable, important, and achievable are authorized. (This is to avoid the practice in many organizations of embarking on many improvement initiatives that are popular in parts of the organization but aren’t completed for lack of cross-function agreement and resources). The catch ball process helps to stay focused on the vital few strategies, as well as facilitate “de-selection.” Clarity about what the organization DOES NOT DO is as important, if not more important than what it does. Operational effectiveness is about

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8 Pascal Dennis, *Getting the Right Things Done*, 2006
10 Karl Scotland, [https://availagility.co.uk](https://availagility.co.uk)

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improving (either stepwise or incremental) existing processes/standards, and strategy deployment is about developing new standards/processes. This connects to point #3; developing new standards assumes risk because you don’t know how it will turn out.\(^5\)

3. Strategy deployment is the process of rapid experimentation to prove a hypothesis true or false. A succession of lean learning loops builds out a solution by testing critical, unknown assumptions in a disciplined, methodical manner.\(^13\)

Our working definition: At IEX, we think about a strategy deployment system in this way. First, we understand that the “purpose of any system is what it does”\(^14\) and that any system derives its purpose from the larger system of which it is a part. If we think of Figure 4 as an illustration of an organization’s management system describing where people in various roles would be spending their time in the “ideal state.” The strategy system (including the deployment of strategy) is one of at least 3 sub-systems that work together to achieve the goal of managing an organization. We describe the “managing for daily improvement” (MDI) system in our fifteenth white paper.\(^15\) And the “leader standard work” system in our sixteenth white paper.\(^16\)

If the purpose of a system is what it does, what does a strategy deployment system do? What problems does it solve? Here are four common problems and some thoughts regarding how a strategy deployment system helps to address those problems:

* Many organizations have activities around “improvement,” but the connection to the most critical strategic objectives (results) is not always evident. A strategy deployment system makes the connection evident to everyone.  
* It is not always clear what the few key priorities are for an organization. A strategy deployment system provides clarity on the few key priorities so that everyone understands what is important and why these are the important goals. Some organizations view this as clarity of the strategic objectives and see priorities as being developed at each level within the organization and intended to define how that level is contributing to the overall strategic objective of the organization once each level understands through strategy deployment what is important and why (the strategic objectives). Each level’s strategic priorities are measured and monitored for modifications via the strategy deployment system. The “managing for daily improvement” (MDI) system measures and optimizes the non-strategic priorities, the operational day-to-day efforts for gains in efficiency and productive. Here is a healthcare example. If the organization has identified a strategic objective as ensuring patients can see a primary care provider when they want to, ensuring there is availability within 7 days of the initial request, several departments and roles within the organization will come up with their own specific and unique strategic priorities to achieve this desired objective, making it a reality. The information technology (IT) department may prioritize changes to the scheduling system that allow more flexibility in scheduling appointments. The reception department may prioritize a new script with patients, asking the patient first what they desire, vs. telling them what is available. The primary care administrator may prioritize how provider capacity is distributed to ensure sites with high demand are supplied with enough providers to maintain availability within 7 days. Once these strategic priorities are successfully implemented and proven to be impactful, they may move into the “managing for daily improvement” (MDI) system for ongoing management and daily improvement (to focus on how to optimize them).\(^6\)

* Many organizations have a large number of initiatives and projects, strategic and otherwise, which will lead to conflicting and competing priorities unless the process is managed. A strategy deployment system minimizes conflicts and competition between the parts of an organization.

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13 *Patient-Centered Strategy*, Jeff Hunter, 2018  

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Executives and managers often find themselves reacting to the urgent (fire-fighting) and therefore not always attending to the most critical objectives. A strategy deployment system **aligns all roles within the organization** so that people (leaders, managers and front-line staff) are “playing the correct position.” This includes alignment of goals, metrics and methods from the CEO to the front-line staff.

In summary, a strategy deployment system helps to provide focus, prioritization and alignment throughout all areas of an organization in order for the organization to **act** on the important strategies that will ensure future success and survival. A strategy deployment system is also a learning system. It helps people in the organization to learn if the right priorities have been set, or if they need adjustment. It helps people to learn about market influences and their influence on the plan. It helps people to learn about internal obstacles and how to remove them. The learning emerges from the various experiments and improvements being conducted to achieve the organization’s purpose and the desired goals.

**III. Ten Lessons Learned** The remainder of this paper describes ten key concepts or lessons that we have learned in our work with various organizations and multiple thought leaders on the topic of strategy deployment. It is our contention that a key system of a Lean Management System is the Alignment System (including the strategy deployment system). Common pitfalls can prevent a team from effectively translating purpose and direction, to action and learning, but these pitfalls can be avoided by applying lessons learned from those who have worked to implement the strategy deployment system.

1. **Survival is not compulsory.**

   In response to a query from one of the authors of this paper, Dr. Deming responded with this brief response: “Survival is not compulsory. Improvement is not compulsory but is necessary for survival.” What did he mean by “survival is not compulsory?” Any company (and any person in a position within a company) can find themselves out of date. There’s no law that says that a company must survive. Any company (and person within a company) that is not continuously re-inventing itself in order to stay relevant to the customers will not continue to exist. Past success does not mean future success. What the customer wanted and used in the past will change (even loyal customers will switch to your competitor). The birth, life and death of products and services can be depicted as an “S-Curve” as seen in Figure 5. We expounded on this model in our second white paper “Evolving World View.”

   The 3rd Edition of Dr. Deming’s book *The New Economics* includes Deming’s “view of the organization as a system” (see Figure 6) which illustrates some important concepts pertinent to the topic of strategy deployment.

   **The zero stage, generation of ideas.** This component of the system was not present in the first edition of *The New Economics*, Deming’s book *Out of the Crisis*, nor was it included when he began sharing the concept with managers and engineers in Japan beginning in the 1950s. “What possible products or services might meet the customer’s needs?” More information about the “Zero Stage” can be found by viewing a video featuring Ron Moen at the 2014 Deming Institute Fall

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Generating ideas requires **consumer research**, which is more than satisfaction of current customers, but understanding what will help the customer more. This might include spending time with the customers, observing them, certainly interacting with them. This might require the creation and sustainment of a “voice of the customer” system. In terms of what is important to the target customer - what do they value? The company then must address how they are positioned in regard to what attributes target customers most value. The sum of a business’s positioning on each valued attribute equal the business’s overall strategy. Here is another car example. If the target customer values safety, styling, and fuel efficiency, how is the business performing against peers in these areas? Is the company rated as the safest vehicle, but lacks in mpg? The company’s overall strategy can be impacted if they focus their strategic objective on increasing mpg of their fleet while maintaining safety. 6

The ideas and the research will then inform the **design and redesign** of products, production, distribution and has implications for interactions with suppliers as well. These activities should prompt an organization’s management to ask and answer these questions: “What business are we in? What business should we be in? What does this mean for clarity and constancy of our organization’s purpose? What attributes are we competing on today? What attributes should we be competing on to win our targeted customers? What does this mean for how we focus and communicate our strategic objectives?”

One example of the implication of this concept is a study of the history of how sound has been stored and shared. Initial sound was stored on wax cylinders, which then gave way to various vinyl discs, followed by tapes (first reel-to-reel, then 8-track, then cassette), followed by computer discs, i-pods and “the cloud.” A company that defined its purpose as making “cassette tapes” could make better and better tapes, with zero defects and great efficiency. But that company would find itself out of business because someone came along and provided another way to meet the customer’s needs. A company that defined its purpose more broadly would not suffer that demise.

In summary, successful strategy deployment requires, useful strategies (ideas) which requires clarity and constancy about the purpose of the organization in order for the organization to survive.

**Practical implications:** When management become complacent about the purpose of the organization (assuming past success leads to future success), they make themselves and their organizations vulnerable to extinction.

2. **Beyond the prevailing (and failing) style of management.** In his book *The New Economics*, Dr. Deming described how the prevailing style of management has led Western Management into decline and that new knowledge (transformation of management) is needed to achieve success. 19 Figure 7 is a reproduction of a figure shared by Dr. Deming that the reader might recognize as an example of the “s-curve” described in the previous section. Survival and improvement will not come from working harder at the prevailing style of management. Survival (and improvement) will only come through adoption of new knowledge.

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21 [https://vimeo.com/110699004](https://vimeo.com/110699004)

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Many, if not all, organizations start their improvement journey by learning and applying tools. This approach is not wrong, but it can become what Pascal Dennis calls a “wheel of fortune approach.”\(^{22}\) At IEX, we describe this as the “quick win” mental model.\(^{1}\) Over time (and with some guidance) managers may start to see that the tools can form a system, and that they need to learn about the principles that underlie both tools and systems. Strategy deployment needs to be more than a set of tools randomly applied. It is the application of specific guiding principles.

Figure 8 summarizes the enormity of the difference in mental models required. We further illustrate some of these differences in the following three tables describing the guiding principles of enterprise excellence in the dimensions of Align, Enable and Improve.

### Table 1 – Principles of Aligning

<table>
<thead>
<tr>
<th>Prevailing Mental Models</th>
<th>Mental Models informed by the guiding principles of Enterprise Excellence(^{23})</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-term thinking and acting. Emphasis on immediate results. Thinking and acting in the present tense, not future tense. Making the short-term numbers look good.</td>
<td>Constancy of Purpose – Management constantly asks and try to answer, “what business are we in?” and “what business should we be in?” Management provides a simple unifying purpose, focusing and aligning all parts of the organization on achieving long-term goals.</td>
</tr>
<tr>
<td>The focus is pushing the product or service out to the customers in the hopes that they will buy them. It is common for people to view their boss as their customer.</td>
<td>Create Value for the Customer – The focus is “customer in” which requires real-time, 2-way conversations. Focus all aspects of the organization on activities that create measurably better outcomes at the lowest cost, highest quality and are valued by the customer.</td>
</tr>
<tr>
<td>The focus is on managing the parts of the organization with the assumption that the organization is “additive” (e.g. if the productivity of each part is good, the productivity of the whole is good). Managing the parts of an organization as individual profit centers.</td>
<td>Think Systemically – (not systemATically) Manage the organization as a system, which means managing the interactions in order to optimize the organization as a whole. By definition, the parts will need to be sub-optimized in order for the larger system (organization) to be optimized – to meet the needs of the customer. Management constantly thinks about how and why components work together across the organization and the impact of individual departments on the organization as a whole. Management facilitates positive interactions between the parts of the organization.</td>
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### Table 2 – Principles of Enabling

<table>
<thead>
<tr>
<th>Prevailing Mental Models</th>
<th>Mental Models informed by the guiding principles of Enterprise Excellence(^{24})</th>
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<tbody>
<tr>
<td>When things go wrong (or right) the focus is solely on the individual vs. the systemic causes. There tends to be reliance on extrinsic motivation. Management views the organization as a machine where people are essentially interchangeable and replaceable parts. Management engages in ranking and rating of people, teams and divisions.</td>
<td>Respect Every Individual – There is total involvement by everyone in the organization. Leaders foster the continuous development of the skills and talents in people to create an environment where all individuals are actively engaged in improvements. Leaders provide a safe environment physically and emotionally.</td>
</tr>
<tr>
<td>The leader as “boss” (power of position). Command and control. People at the top of the organization chart will do the thinking, others will do as they are told “stay in</td>
<td>Lead with Humility – Ideas for improvement come from everyone, honoring those who are closest to the work, providing value to internal and external customers.</td>
</tr>
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</table>

The leader is viewed as the subject-matter expert who tells subordinates what to do, when, and how. We hire smart people then tell them what to do, or continue to do what the boss thinks best and ignore the input of the appointed smart people.

People view “work is for working, not for learning.” The belief is that we hire smart people and turn the focus to getting results, not on learning.

Leaders and managers play the role of teacher, but first they must be good students.

Learn Continuously – Management facilitates lateral learning across the organization. Management encourages continual learning and advancement for everyone. They create systems to support people development. Leaders understand that knowledge flow is one of the most significant competitive advantages. Effective strategic management not only facilitates choice-making but also accelerates organizational learning.

Table 3 – Principles of Improving

<table>
<thead>
<tr>
<th>Prevailing Mental Models</th>
<th>Mental Models informed by the guiding principles of Enterprise Excellence</th>
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<tbody>
<tr>
<td>Management by numerical goals. A numerical goal accomplishes nothing by itself (without a method to accomplish the goal). Numerical goals lead to distortion and faking, especially if the process is not capable of achieving the goal. Focus on numerical goals alone leads to excluding the ascertaining of the real facts first hand at the place where they occur. Reality and context are ignored and lost.</td>
<td>Focus on Process – Manage by improving the processes that produce the results. Leaders focus problem-solving efforts on improving processes, rather than fixing people.</td>
</tr>
<tr>
<td>Depend upon inspection to provide quality and value. Belief that someone “downstream” will catch the defect.</td>
<td>Quality at the Source – Management encourages and recognizes everyone for stopping, correcting and eliminating defects and problems before moving to the next step, process department or customer.</td>
</tr>
<tr>
<td>The tendency is to batch problems and thereby impede continuous flow. Building inventory “just in case.” Saving problems and issues for discussion at committee meetings.</td>
<td>Flow and Pull Value – Management challenges existing processes to create flow of value that streamlines upstream and downstream connections that are triggered by the customer (internal or external).</td>
</tr>
<tr>
<td>React to every variance in performance measures as well as behavior. Look for and act on the one root cause. Ask people to explain variances with the belief that this will result in future improvement. This leads to high levels of frustration among staff since such variation have no unique assignable causes. Holding people accountable for undesirable performance variations that actually can only be ascribed to the process or system that produces it- not the individual.</td>
<td>Understand and Manage Variation – Management understands the distinction between common causes of variation and special causes and the correct action to take, as well as the hazards of incorrect action (tampering). Management understands that the most important application of understanding variation is in the management of people.</td>
</tr>
<tr>
<td>Plan then do, then repeat. Focus on do, do, do. There is a belief that if something works in one area, the idea will work in others. There is a tendency to “copy and paste” and force “best practices.” Management by policy and procedure.</td>
<td>Embrace Scientific Thinking – Management has a good understanding of the Plan Do Study Act (PDSA) cycle. They follow the entire cycle (not just Plan and Do) and also use multiple continuous cycles. The job of a leader and manager is to teach and practice PDSA every day. Leaders and managers need to “go-see” to grasp the current situation. People in management have routines</td>
</tr>
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that allow them to understand both inch wide & mile deep in their zones and develop a “sympathetic understanding of their zone.” PDSA cycles are small enough to be manageable, yet large enough to be meaningful.  

| The goal of standardization is viewed as “uniformity.” The tendency is to stop when the task or project is “done” or “good enough.” The focus is on accomplishing task, and doing the work, not about improving the work. | Seek Perfection – Continuous improvement. Nothing is “a given.” Anything and everything can be improved and changed. Use standards (the agreement about the current, best way to do something) as a basis for improvement. Leaders are constantly seeking ways to improve systems and processes and challenge the status quo. |

We have found that it may be helpful to describe what strategy deployment is not:

- **Strategy deployment is not Management by Objective (M.B.O.)** as commonly practiced, not as Peter Drucker intended. As Dr. Deming pointed out, “With M.B.O. as practiced, the company’s objective is parceled out to the various components and divisions. The usual assumption in practice is that if every component or division accomplishes its share, the whole company will accomplish the objective. This assumption is not generally valid: the components are almost always interdependent.”

- **Strategy deployment is not Management by Results (M.B.R.)** which entails taking immediate action on any fault, defect, complaint, delay accident or breakdown. Dr. Deming refers to this as “tampering” which is a common practice when people do not understand variation and to react to it. We discussed this briefly in our seventh white paper “Principles for Improving.”

- **Strategy deployment is not Management by Imposition of Results (M.B.I.R.)** which Dr. Deming described as imposing numerical targets without consideration of the capability of a process. Kelly Allan describes this and M.B.R. as “management by scorecard, spreadsheet and other forms of trickery.”

In our first white paper we described how systems drive behaviors, but we must also realize that measures will also drive behaviors. Dr. Brian Joiner observed that people will respond to the requirement to hit a numerical target in one of 3 ways:

1. **People will distort the data.** One example is “creative accounting” – “Oh, we don’t count those as inventory any more ... They’re on our supplier’s books.”

2. **People will distort the system.** People will try to get the demanded results at the expense of other results. “You want lower inventories? No problem!” Inventories miraculously disappear ... but at what cost elsewhere?  

3. **People may improve the system** that is producing the outcomes. This entails making fundamental changes that improve quality, prevent errors, and reduce waste. One example: reducing in-process inventory by increasing the reliability of operations.  

Option number three is the desired choice and will only happen when management adopts different mental models.

We have also observed the sub-optimization and waste that occurs when there is confusion between an organization’s stated or espoused purpose (something they put on posters and in presentations) and the “real” purpose (what they talk about, ask about, and hold people accountable to). Management sets the climate for an organization, and this climate starts with the mental models held by management. If management believes that the real purpose is to “hit the numbers” and that the best way to do that is to focus on the results, then people will respond accordingly with their own informal systems and activities in order to be successful. A helpful definition of a company’s culture is the “sum of the behaviors exhibited by everyone in the organization to achieve desired results.” Therefore, these informal systems and activities produce the culture of the organization.

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26 Roderick Baker, personal correspondence 
27 https://www.kellyallan.com
28 Brian Joiner, Fourth Generation Management, 1994

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On the other hand, if management understands and focuses on the espoused purpose, and understands that how the organization achieves the purpose, as measured by the results is as important is getting the results, then they will set a different climate and a different culture will emerge. Further exploration of this point can be found in our ninth white paper “True, True North” and our third white paper “Practical Wisdom.”

**Practical implications: If managers do not fundamentally change the way they think and act, a strategy deployment system will merely be the next tool that is used to achieve results – by any means necessary. This will not result in a culture where everyone is working toward continual improvement but will merely be the continuation of “command and control.”**

3. **Shift the focus from “selection” to “deployment.”**

We’ve observed that many organizations have familiarity with (and activity around) strategy development, but less understanding and little activity around strategy deployment. Figure 9 summarizes a concept described by Pascal Dennis which shows the prevailing view with a primary focus on the **selection** of the correct strategies, contrasted with the evolving view of a shift in thinking and action to the **deployment** of a few, key strategies.

The prevailing approach entails more focus, time and effort on selection, with much less time and focus on deployment. Under the prevailing view, after senior management devotes time and effort to discern what they think the “correct” strategy is, they will turn the implementation over to others - “OK, we’ve done the heaving lifting, now get this done.” This might show up as a strategic plan that management believes will work for the next 3-5 years. These strategies are often reviewed annually, and usually “tweaked,” but are left largely intact until the next major update (in 3-5 years).

What is needed is a shift in thinking and action, the translation to get it down to bite-size activity for everyone. “What ideas can we test quickly to see if they will work? How can we create a process of experimentation to prove a hypothesis to be true or false? This needs to become a regular and routine system, not an annual event. We discuss what the “big and little” PDSA experiment cycles might look like in an organization in point number 10 in this paper.

Dan Robertson offers this advice quoting from the book *The Four Disciplines of Execution* in order to successfully execute plans to meet organizational goals, one must follow the four disciplines.

Discipline # 1) focus on the wildly important goals of the organization (the measures that have the greatest opportunity for improvement);

Discipline # 2) act on leading measures as a strategic bet, applying leverage to the predictive and influenceable lead measures that move the lag measures;

Discipline # 3) keep a compelling scoreboard that lets the team know if it’s winning or losing; and

Discipline # 4) have a cadence of accountability to ensure weekly, unconditional commitments are met, and learning is shared and spread.

In 4DX, the “law of diminishing returns is described as one of the primary reasons why teams MUST focus on the critical few greatest opportunities for improvement (as opposed to the all too common (and contradictory) idea of saying yes to as many good ideas as possible).”

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31 McChesney, Covey, and Huling, *The Four Disciplines of Execution*, 2012
32 Personal correspondence with Dan Robertson, Penn Medicine Lancaster General Health.

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Practical implications: When managers spend most of their time and energy development what they believe is the “correct” strategy, they are wasting time and resources that could be used to quickly test potentially viable strategies through “safe to fail” experiments.

4. Think outside the (tool) box.
We’ve observed the use of many tools in any strategy deployment system. Examples of common tools include: x-matrices, bowling charts, and A3s. The x-matrix is intended to help show the connection between various strategies, goals, methods or tactics and subsequent measures at various responsibility levels in an organization. We’ve noticed two types of A3s in use: strategic and problem-solving. We explore this topic in more detail in point number 10 of this paper. Another common tool as a “bowling chart” which is a method to track progress on key measures, usually month-to-month and often color-coded red or green depending on comparison to performance against a target.

There seem to be two “schools of thought and practice” related to strategy deployment and tools:
1) The use of an x-matrix, and a cascade of related x-matrices throughout the organization provides the “big picture” and shows the interconnection between priorities and metrics and those who need to carry out the strategies.
2) A series of A3s, starting with a “mother A3” connected to “baby A3s” shows the full picture of current situation, hypotheses on root causes and well as hypotheses on countermeasures that might be effective.

There is no such thing as the “right tool.” The more useful question to ask is “which tools are going to be most useful to accomplish the aim of the strategy deployment system?” More specifically, “do the tools drive the desired ideal behaviors AND the desired performance outcomes?” Tools, processes, systems and behaviors work together to improve performance. Focusing on only one of these components will sub-optimize improvement.

In our first white paper¹ we explored the fundamentally different approaches in the use of tools and their relationship with system as illustrated in Figure 10. The left-hand side illustrates pushing tools into existing systems and routines often which inevitably leads to pushback and does not create the necessary buy-in by those who need to understand and use the tool. This is often called the “flavor of the month” approach. We use the term the “comfort of the comfort zone.” Designing systems based on guiding principles (right-hand side) requires selecting or pulling tools and experimenting with their utility to drive the desired behaviors AND desired results.

You may have heard the saying “don’t get wrapped around the axle.” A similar saying can be useful in the design of a strategy deployment system - “don’t get wrapped up around the x-matrix.” The x-matrix can be a very powerful and useful too, and some people gravitate to it stronger than others. We’ve noticed that if you introduce the x-matrix too early, there are often unintended consequences. It’s helpful to remember that most any tool is a solution to a problem that someone had in the past. In our experience, copying tools without fulling understanding the problem that is being solved, and the principles behind the tool, will not lead to a sustainable culture of continual improvement. Targeted experimentation is a more useful approach. For more on this topic, refer to point number 6 in this paper, “There is no Instant Pudding” as well as our eighth white paper “Systems by Design.”³³

Practical implications: When managers view strategy deployment as merely a set of tools (divorced from principles and systems) they fall prey to the “tool trap.” Strategy deployment will be seen as compliance to use the correct tool, rather than a focused effort to achieve the organization’s purpose.

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5. **Too much on our plate.**
Without a strategy deployment system, management is likely to find themselves with “too much on their plate.” Each additional strategy in the executive suite has a compounding and multiplicative affect throughout the organization which creates downstream consequences of overburden, unevenness and eventually waste.

We have observed at least 2 approaches to address this challenge:
1) The first is the “clean slate” approach. Starting with a “blank sheet” the executives try to agree on the few key strategic priorities for the organization. Not everything is strategic and not everything is a priority. If some agreement can be made on the few key (5 max) strategic priorities and the distinction between operational items, then the strategy development and strategy deployment systems can work together to keep the organization focused on the few key items and keep the “plate” to a manageable level. This might be facilitated through the use of a tool like and x-matrix or series of A3s.
2) The second approach typically includes a “post-it” exercise. Executives are asked to individually identify ALL the projects and priorities they are working on. After placing each one on a single post-it note, and placing these on a wall, the team can view the scope of their problem. The exercise often exposes competing projects and duplicative efforts. Many times, the exercise is conducted by the next levels of management as well in order to see what’s on their plates and how this wall of projects connects to the executive’s wall. Again, competing projects, duplicative efforts can be identified.

Here are some important considerations and questions to help management to filter and focus their efforts:
- The fullness of our plates is the outcome of our processes and systems (if we have them). It is helpful to look upstream, what are the causes? How do we change our processes? Or create better processes if we don’t have them.
- Consider the down-stream consequences of having too many goals at the top of the organization. The burden on the organization increases exponentially. If you teach people to look for waste in their work processes, it is also important to understand what is causing the waste. Overburden (and unevenness) caused by management is a primary root cause of subsequent waste in the organization. When we see the organization as a system (or as a value stream) we can better appreciate the downstream impact of upstream actions.
- It is important to ask if everything we are trying to do is of equal and strategic importance. It is often helpful to sort out and separate the activities that are considered “operational” (necessary for keeping the lights on) and what is strategic (differentiates us from our competitors). Referencing the 4DX\(^1\), it is helpful to understand the urgent work (the whirlwind) and the important work (improvement). The urgent work “acts on you” while the important work requires “us to act on it.” There seems to be a correlation to how the operational work (the whirlwind) “acts on you,” while the strategic work (the improvement work) requires “us to act on it.”
- How can we better prioritize and filter the most critical strategies and activities, as well as remove those that we will not pursue? Many organizations introduce “5S”\(^2\) as a method to improve their work processes. The five S’s need to be applied to the strategy development and deployment system before we ask people to try to apply this thinking in their work areas. If we try to 5S our plate, how do we keep it manageable? How do we say “no” or “not now”? What system will we create that will drive the necessary behaviors and habits? It is helpful to have a process to deselect some opportunities in order to have the capacity to focus on the critical few greatest opportunities for improvement.
- There will always be more good ideas than there is capacity to execute.
- In healthcare, the voice of the customer needs to be used more in the de-selection process. Most healthcare managers seem to be accustomed to third-party mandates metrics. Healthcare could learn from other industries by letting the customer tell them what is most important. The notions of driver numbers and watch indicators are also helpful to determine where management needs to move the needle.\(^5\)

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We developed a method to help leaders to “clear their plate” and focus their efforts which is illustrated in Figure 11. An algorithm like this can help management to determine what is mission critical, what is important, what can be placed on a wait list, and what can be put on hold.

Getting the right things done, by the right people requires more than the introduction of a method (or a tool). Other changes will be needed as well. Figure 12 elaborates on the basic framework we described in Figure 4. In the “ideal world” leaders would be spending the majority of their time thinking and acting in the strategic role. Managers would split their time between the strategic and the daily improvement focus. Front line staff would play a primary role in improving the daily work that provides value to customers. In our experience, the amount of time that leaders are working in the strategic role is far less than it needs to be (represented by the red dotted-line in the upper left-hand corner. In order to move this line to the optimal level for all roles, there needs to be a re-alignment of roles and also deliberate efforts (including systems and processes) for people development. The comments at the top of Figure 12 summarize the key roles in the strategic systems and the comments on the bottom summarize key roles in the Managing for Daily Improvement system.

Practical implications: Without a strategy deployment system, management is likely to find themselves with “too much on their plate.” Each additional strategy in the executive suite has a compounding and multiplicative affect throughout the organization which creates downstream consequences of overburden, unevenness and eventually waste.

6. There is no instant pudding. Developing and maintaining a strategy deployment system takes time (developed over years) and includes many cycles of experimentation. Many managers hope that they can copy what another organization has done and that it will work for them. We have never seen this work. What does work is an approach that resembles “gardening” versus managing a machine. What does a gardener do? A good gardener has developed knowledge of the art of gardening (more than mere skills.) A gardener prepares the soil and creates the necessary conditions for success. A knowledgeable manager looks for receptivity of ideas and builds a critical mass of interest and support. Like a gardener, a manager shares seeds of ideas, and helps them to take hold. Both the gardener and the manager monitor their work on a regular basis. A gardener tends to the weeds that can choke out the intended growth. A manager removes barriers that inhibit growth of the strategy development system. Both the gardener and the manager start simple, engage in rapid experimentation, and exhibit persistence and patience. Being a gardener can be difficult to explain, but after you “do it” you know more about being a gardener means. Each day is an exercise in listening and gardening to keep organizational alignment in order to foster growth towards your ideal culture and goals. There is a helpful quote from Steven Spear’s book, Chasing the Rabbit/The High Velocity Edge, “no one can design a perfect system in advance, planning for every contingency and nuance. However, people can discover great systems and keep discovering how to make them

35 Bob Mayfield, Superintendent, Kimberly Area School District, personal correspondence

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It is helpful to hold a positive mental model of learning from failures, as opposed to the faulty mental model that all failure is negative and should be avoided. Managers might be tempted to try to copy a mature system that they discover on a benchmarking tour. They think, “if it worked there, it will work here.” We've noticed a problem that people encounter when they hear about or see an “advanced system” (from another company, a consultant, or perhaps an improvement engineer from an organization that has been about the transformation effort for many years.) The desire is to try to quickly emulate (or copy) the advanced system. In our experience, this does not work.

Here's a simple experiment to illustrate this concept. Take a minute and go to this link and view the video of the experience Formula One race crew: http://bit.ly/maturesystem. This is an example of a well-coordinated and seasoned team that is able to execute their tasks quickly which often times is the difference between first and second place in the race. Now go to this link and see how the same process began: http://bit.ly/beginnningssystem. Every organization starts where they are and evolves to get better.

The system cannot be merely transplanted. The process that DOES work is illustrated in Figure 13. The process begins with simple, targeted experimentation. Over some time and multiple PDSA cycles, integration begins to occur, and systems begin to form. As the process continues, the systems will integrate and connect. Eventually, organizational expansion is possible as the systems become the dominant way of doing the work. This becomes the culture of continual improvement.

Practical implications: Managers who merely copy the tools and methods from organizations may experience some temporary, short-term improvement. However, if the systems are not built and improved by the people who must use them, they will be discarded for the “next, new, one thing we must all follow.”

7. Understanding True, True North
Tracking progress on the deployment of strategies means attending to both Key Performance Indicators (KPIs) AND Key Behavior Indicators (KBIs). We described this in more detail in our ninth “True, True North” white paper.

Figure 14 illustrates several important concepts. First, the format is arranged horizontally which is a view of the organization that we described in our tenth white paper “Side (by Side) Management.”

We start with the purpose of the organization on the left-hand side of Figure 14. Desired results (what we want to GET) is familiar to managers in most organizations. These are sometimes described as Key Performance Indicators (KPIs) and the process of catch ball from the organization level to the department level

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and then to the tactical (local) area is illustrated on the lower portion of Figure 14. What occurs in many organizations is not really catch ball but is experienced as “catch anvil.” The desired measures are parceled out in one direction with little dialogue or discussion about the method by which the measures will be achieved (refer to comments from Dr. Brian Joiner, page 10). Lack of effective catch ball creates confusion, frustration and cynicism.

The upper portion of Figure 14 describes a catch ball process around Key Behavior Indicators (KBIs) which is based on the management’s current understanding of the guiding principles of enterprise excellence and the translation of those principles into ideal behaviors at various levels of the organization.

Finally, the strategies that the organization is trying to achieve is illustrated in the middle of Figure 14 as a wedge. At the organizational level, the number of strategies will be defined. The number of pertinent strategies that impact various divisions will be less than the total number for the organization and lesser-still for the tactical areas. We’ve represented this as a “tapered” figure.

Practical implications: Managers who view “true north” as the measures that they want to achieve, are confusing “purpose” with “results.” They will try to achieve these results by any means necessary, not through sustainable ideal behaviors based on solid principles. Their efforts will merely be “management by results” in disguise.

8. “Breakthroughs” and “Big Rocks”
Jeff Hunter offers his equation for True North as being comprised of three components. Strategy Deployment + Operational Effectiveness + “Big Rocks” = True North. Here are Jeff’s definitions for each of the components:

**Strategy Deployment** - Developing a new standard (process, method) to create differentiation from competitors that is relevant to customers. Competitive strategy is about being different. It means deliberately choosing a different set of activities to deliver a unique mix of value. Differentiation comes from process redesign. What is really important to customers? If we could figure that out, we would be unique. “Breakthrough” strategies would be included here. Breakthrough strategies may include things that we don’t currently know how to do. We’ve already briefly discussed two examples of breakthrough strategies (see comments about the invention of the hybrid automobile, page 3).

**Operational Effectiveness** - Improving a current standard (process, method). Continuous and daily improvement of work systems is an example of the kind of activity in this category. We describe this activity as “managing for daily improvement.”

**“Big Rocks”** – These are the big projects that consume cross-organizational resources but will not create differentiation. These big projects may not be strategic differentiators, but they need to be done – they are “necessary but not strategic.” Examples of big rocks might be the implementation or a major upgrade of a company-wide computer system. Some organizations put Big Rocks on their X-matrix because these projects compete for resources with strategy deployment, and it is helpful to visually see that and make it explicit.

Adequate time and focus needs to be carved out for all three components. When the “big rocks” consume the time and energy of the organization, true north cannot be accomplished. We’ve noticed that there is a great attraction to placing big rock strategies in the x-matrix (or hoshin) tool. This may or may not be useful. The important question to ask is “what are the desired behaviors and desired results we want to see?” Then determine if placing the big rocks on the x-matrix is driving the behaviors and results you need, or does it drive unintended behaviors or unintended results.

We contend that the culture of any organization is defined as the “sum of the behaviors that are exhibited at all levels in the organization in order to achieve the desired results.” Therefore, it is our contention that the appropriate use of a strategy deployment system can address yet another common organizational problem: prevailing strategy management is not effectively changing behavior/culture in the organization.

**Practical implications: Managers who confuse the big rocks with the few, key breakthrough strategies will dilute their limited resources necessary for continual improvement, thus causing delay and frustration.**

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9. **One system that is owned by top management**
In our first white paper\(^1\), we described how the various roles of leaders, managers and front-line staff need to be aligned within the IEX sustainability model. Figure 15 illustrates that Leaders must be the primary owners of the Guiding Principles, and subsequent Ideal Behaviors. By “ownership” we mean they monitor, maintain and improve the understanding of these principles. The reader will notice the “80/20” designation. This indicates “primary responsibility” resides with leadership. This does not mean that Leaders do not own systems and that they do not own tools. Strategy Deployment is one of the systems that leaders must own.

An example of the clarity of system ownership is provided by Tim Pettry describing the improvement model developed at the Cleveland Clinic. The model has four interdependent components:
1. **Organizational alignment** – identify and communicate what matters most.
3. **Problem solving** – improve what matters most.
4. **Standardization** – sustain what matters most.
This management system can be owned by all levels of the organization, however, the alignment piece of “What Matters Most” (#1) is what senior management owns and needs to cascade to assure the rest of the organization is aligned.
The middle manager becomes the most important role in the deployment process as they translate the strategy into an operational implementation plan.
Front-line associates need to know what matters most to the organization and how their work aligns with the strategic goals of the organization and adjust with coaching and guidance from management.\(^3\)

A system will not manage itself, any system must be managed.\(^15\) Systems require “care and feeding.” Energy and attention must be continually focused on the system, otherwise the informal systems (entropy) will take over. Responsibilities must be assigned in order for the necessary process steps of the system to achieve its necessary purpose. The system needs to be managed. One way to illustrate a strategy deployment system, and the designation of roles and responsibilities is illustrated in Figure 16. This is an example of the application of the IEX “system build” framework (described in our eighth white paper “Systems By Design”).\(^33,40\) The necessary process steps must be assigned to the appropriate roles and they will need to build these tasks into their personal management (standard work) systems.

**Practical implications: Managers who do not understand their role to build, monitor and maintain the systems under their charge will see their improvement efforts short-lived and unsustainable.**

10. **Big and Little PDSA Cycles**
One of the key guiding principles behind a strategy deployment system is to “embrace scientific thinking.” Any strategy or idea for improvement is a prediction that “if we do this, then that will happen.” Our theories need to be tested empirically, and we cannot know in advance that an idea will work. We touched on this briefly in our seventh white paper “Principles for Improvement.”\(^25\) A thorough understanding of this principle, is not complete

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\(^{39}\) Tim Pettry, personal correspondence  
\(^{40}\) Example courtesy of Winneshiek Medical Center, Decorah, IA  
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without some study of the work of Dr. Deming who saw this as a cycle for learning and for improvement.\textsuperscript{19,20} A strategy deployment system is also a lateral learning system.\textsuperscript{5}

Figure 17 is one way to view the deceptively simple PDSA cycle as it relates to a “big” PDSA cycle (applied to strategies broadly across the organization. At the center we have placed “grasp the situation” which is important to keep in mind in all phases of the cycle.

In the “plan” phase we are trying to formulate hypotheses about what will differentiate our company and provide value for the customer. In the “do” phase we are developing the idea, and also moving into “deployment” which requires translating the implications at various levels of the organization. The term “catch-ball” is often used which is two-way, interactive process to communicate what we are planning to do, and why in order to better understand the implications across the organization, as well as to minimize any unintended consequences. We notice that in many organizations, the process feels more like “catch anvil” versus “catch ball” – meaning the process is one-way (see previous comments on page 10 regarding M.B.O., M.B.R., and M.B.I.R).

In the “study” phase we take time to reflect and understand how our experiment is going. What worked? What didn’t? What have we learned? What surprised us? The reader may find it interesting that Dr. Deming insisted on the word “study” not “check.” Study means taking time, reflecting, using data and having dialogue. “Check” infers a “quick look” to compare actual to plan.\textsuperscript{19,20} This may be one reason why many people have described being good at PD, but not so good at SA. It could be easy to gloss over the study phase if it is seen as a quick check.

The next phase has been described as “Act, Adjust, Adapt or Adopt.” In this phase we are deciding what to do next based on the conclusions from our study. The PDSA cycle is not applied only once. It is a continuous iterative process of multiple cycles for purposes of learning and improving.

One example of what this might look like for both “big” PDSA cycles as well as “little” PDSA cycles is shown in Figure 18. A formal planning process (including catch ball discussions) may take several months. At a point in time, the organization might move from “planning” to “doing” which then triggers multiple “study and adjust” cycles at various levels of the organization. Over time, the time devoted to “planning” might shrink.

Various tools (tactical elements) will be helpful as components of a strategy deployment system. These might include x-matrices, strategic A3s, problem-solving A3s, process behavior charts for tracking key measures, catch ball meetings, review huddles. The various tools can help to know where to go and see the “hot spots.” The tools can also create connections between levels (sometimes called “tiers”) of strategy deployment and can ensure that there is a supportive system in place for problem solving and ultimately achieving the targets.

As a reminder, it is helpful to design and experiment with the tools that will work for the organization, and honor appropriate tool ownership at all levels. A key question to remember to ask is “what behaviors and outcomes is each of
the tools driving?” Applying the 5 S’s to a strategy deployment system can be one of the most important activities that management can engage in. Treating strategic thinking as PDSA thinking seems to be a most useful way to involve executives in learning PDSA thinking and modeling the behavior.5

Practical implications: Managers who fail to see their role as scientists conducting experiments will fail to see a culture of continual learning and improvement. Their efforts will be limited to continuous series of short-term and unsustained fixes.

IV. Summary
In this paper we provide some historical perspective as well as definitions to the topic of strategy deployment. We describe how strategy deployment can be one of the key systems that is part of an organization’s overall management system. We also offer ten key lessons that we have learned about strategy deployment, as an approach and as a system. Our purpose was not to duplicate the information and knowledge that can be obtained from many useful references and resources on the topic, but rather to share what we have learned from various thought leaders and fellow pracademics.

Our White Paper Series:
Our first White Paper “Foundations for Transformation: Linking Purpose, People and Process”1 describes the common patterns that we have observed as executives and managers have attempted to create a culture of continuous improvement in their organization. Many find themselves trapped in a cycle of “program of the month” approaches that never seem to produce the sustainable transformation of management that is necessary. However, there are some who desire to break away from this pattern and wish to switch the direction of their efforts by understanding the power of purpose, as well as learning and practicing new principles of management. We also wrote a version of this paper with language that relates to application of the principles to education.41

Our second White Paper “Evolving World View: Implications for All Industries, Including Healthcare”18 describes the sources of knowledge that will be needed in order to manage effectively in the twenty-first century. We described how the world view is changing from the “machine age” mindset that has driven the traditional “plan, command and control” approach, to a “systems view.” We explained the evolution of thinking that is the foundation for the principles of enterprise excellence.

Our third White Paper “Practical Wisdom for Addressing Problems”30 describes the practical benefits of understanding the difference between convergent and divergent problems, including what we can reasonably expect from ourselves and from others when attempting to address the important problems of management. The tendency for most executives and managers is to look to recipes and formulas to tell us what to do – a prescription for how to deploy a lean management system. There is no recipe, formula or prescriptions. But there is knowledge that can guide our actions.

Our fourth paper “One Approach to Deploying a Purpose and Principle-Driven Transformation”2 shares our current thinking about “deploying a cultural transformation” based on the knowledge and contributions of many thought leaders, as well as observing patterns in organizations from many industries that are attempting and succeeding at a cultural and management transformation.

Our fifth paper “Principles for Personal and Organizational Transformation – Align”23 describes the principles behind the IEX model, specifically those principles primarily focused on aligning the improvement efforts so that individuals can have a clear “line of sight” between the work they do every day and how it connects to and supports the organization’s purpose.

Our sixth paper “Principles for Personal and Organizational Transformation – Enable”24 describes the principles behind the IEX model, specifically those principles primarily focused on enabling people to be engaged in and improve their work systems.

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Our seventh paper “Principles for Personal and Organizational Transformation – Improve” describes the principles behind the IEX model, specifically those principles primarily focused on improving the work.

Our eighth paper “Systems By Design” describes the importance of design and redesign of key systems, in particular supporting systems of alignment, enabling and improvement. We describe a method, including a “system standard” that can help any executive and manager design and redesign key systems that will help them contribute to their organization’s purpose.

Our ninth paper “True, True North” describes the benefits of more fully understanding True, True North and how this can avoid the trap of the narrow definition of True North only as measures. Without this understanding, the pursuit of true north can merely be “management by results” in disguise.

Our tenth paper “Side (by Side) Management” describes a more useful view of the traditional hierarchy model, and the implications for connecting strategy deployment to daily management in order to provide value to customers, as well as facilitating true knowledge creation in the organization.

Our eleventh paper “A Pracademic’s Guide to Strategy Deployment” describes some history of strategy deployment, and proposed definitions, as well as ten lessons that we have learned about the idea of strategy deployment, as well as a strategy deployment system.

Our twelfth white paper “Understanding and Application of Dr. Deming’s System of Profound Knowledge in Healthcare” is a reprint of a presentation from the 2014 Deming Research Symposium.

Our thirteenth white paper “Understanding and Misunderstanding Variation in Healthcare” is a reprint of a presentation from the 2015 Deming Research Symposium.

Our fourteenth white paper “Performance Evaluation – How is this still a thing?” is a reprint of a draft proposal for the 2016 Deming Research Symposium.

Our fifteenth white paper “Managing for Daily Improvement” describes one of three primary systems that organizations often create in order to build a sustainable culture of continuous improvement based on the guiding principles of enterprise excellence.

Our sixteenth white paper “Leader Standard Work – A Personal Management System” describes how any manager can create and improve a system that helps them to connect their daily work to the strategies of the organization and to the daily improvement system for which they may also be responsible for.


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We bring purpose to life by advancing the use of practical application of principles, systems and tools in pursuit of enterprise excellence.

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