



## The SMART Organization Process (SMART-OP)™



### PRE-ENGAGEMENT: Get SMART Meeting

In this fast-paced exploratory 2-hour meeting with the entire leadership team, we cover:

- Who you are
- Who we are
- What we believe
- How we get it done through the SMART Organization model and process
- Whether we are a good fit for each other

### DRIVE Team Health

Healthy teams are much more aligned, committed and ready to focus on clarifying vision & strategy. In this two-day leadership team workshop we first focus on creating a healthy and effective leadership team powered by *The Five Behaviors of a Cohesive Team*™. Using the results of the team assessment taken during pre-work and individual interviews regarding team health; we take a deep dive into Building Trust, Mastering Conflict, Achieving Commitment, Embracing Accountability and Focusing on Results. Individuals will also agree on the team's next 90-day priorities.

### CLARIFY 1 Vision

Approximately 30 days later, we will reinforce concepts from the initial 2-day team health workshop including review of the team's 90-day priorities. Next we'll focus on CLARIFY day one - establishing the company's overall vision by answering six essential questions to clearly define your company's core values, vision, competitive advantage, target market, and brand experience.

### CLARIFY 2 Strategy

This high impact session will focus on strategy. We'll begin with continued reinforcement and review progress from previous team health and vision sessions. We'll spend the majority of this session focused on one major question: What is most important? We will identify your three and one-year goals, 90-day priorities and establish a company scorecard. Finally, the team will be introduced to the SMART Meeting framework. Together we will design how to ensure continued discipline in using this meeting framework to achieve execution excellence.

### ALIGN Organizational Readiness

Once the leadership team is whole-heartedly committed to the Vision + Strategy the next step is to ensure the organization structure, systems, talent and ideal culture are aligned to create organizational readiness. During this time communication plans are developed, competencies are determined and leadership capabilities reviewed. Organizational systems and processes are determined to ensure alignment of the Vision + Strategy. This includes developing the plan to engage the next level of leaders and enlist their support.

### ENABLE People to Action

Leaders and managers are the catalyst for the SMART organization by creating accountability, passion, engagement and the "right" environment for people to thrive. We work with the leadership team for one day to create their action plan. Organizations may have the internal resources to train and ENABLE, or they may need our continued training and support to ensure leaders facilitate: consistent reinforcement of key messages; right people, right seats; efficient processes and procedures; recognition and appreciation; effective meetings and communication.

## Stay SMART Meetings

We are committed to creating sustainability of your SMART organization. As a result, we continue to work with the team for four additional quarters to effectively integrate the SMART meetings designed to ensure we are maintaining traction in meeting goals, aligning process and creating accountability.

### **Quarterly Calibration**

Every 90-days, teams must recalibrate to ensure everyone is collectively focused and committed to the same priorities. This one-day operational meeting is designed to review progress and reset quarterly goals; discuss talent highlights; develop leaders, strengthen team health, review processes, and manage issues and opportunities

### **Annual Planning**

This two-day 4<sup>th</sup> quarter off-site is designed to prepare for the upcoming year; team health checkup, vision + strategy review, goal setting, SWOT, talent assessment, issues management, and reviewing/creating a blueprint for leadership and talent development.

## Executive Coaching

To be a SMART leader, we must use all three brains: the one in our head (IQ), our heart (EQ), and our gut (GQ).

Lasting change is difficult without accountability. We know how easy it is to get distracted from long term goals. A coach will hold the leader accountable for the results they want along the way. The coach will end up knowing their client better than most and be a trainer, facilitator, motivator, mentor, teacher and most of all, a trusted advisor. The coach's objective is to help the individual do what is difficult so they can really own their position and steer it to where they want it to go. They will be in their coachee's corner for as long as they want, supporting their goals, and showing them where they get in their own way.

With a Coach's help, individuals learn to embody SMART leadership and management skills that ENABLE others to own their jobs, help develop great systems, and build a culture where people do great work and love being part of an exceptional organization.

## Ongoing Self-Managed Stay SMART Meetings

Meeting	Time Frame	Focus
Daily Huddle	5 –10 minute	Morning check-in to review priorities and direction, and address questions and obstacles. Team members stand to ensure the meeting is quick.
Manager 1:1	30 – 60 minutes	Weekly one-to-one interaction with each direct report. Designed to partner and coach on responsibilities, tasks and goals.
Weekly Pulse	90 minutes	Team meeting to discuss business highlights, current goals and scorecard, and manage opportunities and obstacles.
Ad hoc Strategic	2 – 4 hours	Meeting that occurs when critical issues or initiatives require the team to focus their attention on one or two topics that are more strategic in nature and require time to plan and prepare..