



Tomlinson & Associates Presents
**KeyneLink's
Executive Summary**



Over 70% of the reasons why CEOs fail can be attributed to problems with execution! Knowing how to plan and execute, while overcoming “today’s surprises” is the most foundational capability any organization can have. The idea of balancing strategy and execution is not new. Of the two, execution is by far the hardest to achieve. It is the place where most businesses fail. Research shows that 83% of all strategies fail to get fully implemented.

What a minute! Are you saying accountability and execution are more important than strategy? In the long run, yes! A mediocre strategy well executed usually wins out over a great strategy implemented with mediocrity. Why is executing strategy so difficult? When executives were asked to name their number one barrier to effective strategy execution, the top two answers were *company culture* and *past habits*.

You can change that! KeyneLink’s *strategy execution management* system integrates an organization’s vision and core values with the daily activities of its people. This repeatable methodology is designed to bridge the huge gap between planning and implementation. KeyneLink is part process, part software and part roadmap. It motivates organizations, teams and employees to work together to reach goals and to head off problems before they become big.

Strategy execution management is the key to successful strategy implementation. It’s not enough to manage the execution of individuals in an organization; rather individuals’ activities need to be driven by the organization’s strategy and goals. It starts with defining the strategy, then clarifying the organizational initiatives and continues with the execution of it. The purpose of *strategy execution management* is to successfully carry out the strategic plan in order to realize the organization’s vision.

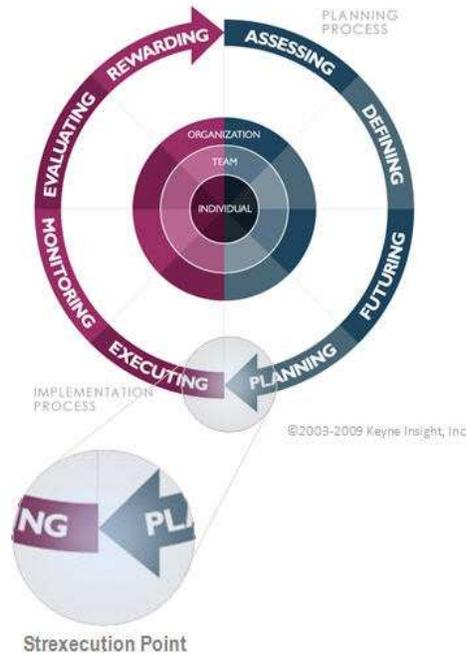
Tomlinson & Associates uses KeyneLink’s *strategy execution management* system to help clients clarify, deploy and achieve their organizational initiatives because in today’s economic environment, **Results Rule!**

The following 10 pages give a great overview of the KeyneLink system and how all the pieces fit together. For further information and/or a demonstration of this impressive system, please give Gary a call at (919) 847-6235 or e-mail him at gary@gary-tomlinson.com.

Thank you,

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Tomlinson & Associates' KeyneLink *Strategy Execution Management System*



Strexecution Point:

The *Strexecution Point* is the point of transition between the strategic plan and execution. This is the point at which many management teams falter by failing to recognize the importance of managing strategic execution. Instead, they allow it to be eclipsed by the urgency of day-to-day activities. The key to successful navigation through the strexecution point can be found in KeyneLink, the only *strategy execution management* tool of its kind on the market.

Most companies treat planning like a task. They get their senior management team together at the beginning of the year and create this great plan that everybody's fired up and excited about and now they can check the box that says “we have a plan.” Then too often, everyone goes back to work and the strategic plan goes on the shelf. With the exception of maybe some of the sales goals and financial goals, it really doesn't get looked at or reviewed much until the end of the year when it gets pulled back out to see if the plan was met.

What KeyneLink is really about is operationalizing your annual strategic plan. It's called KeyneLink because it really is the link between execution and planning. And the whole purpose of managing execution is to achieve organizational initiatives. That's what it should be about!

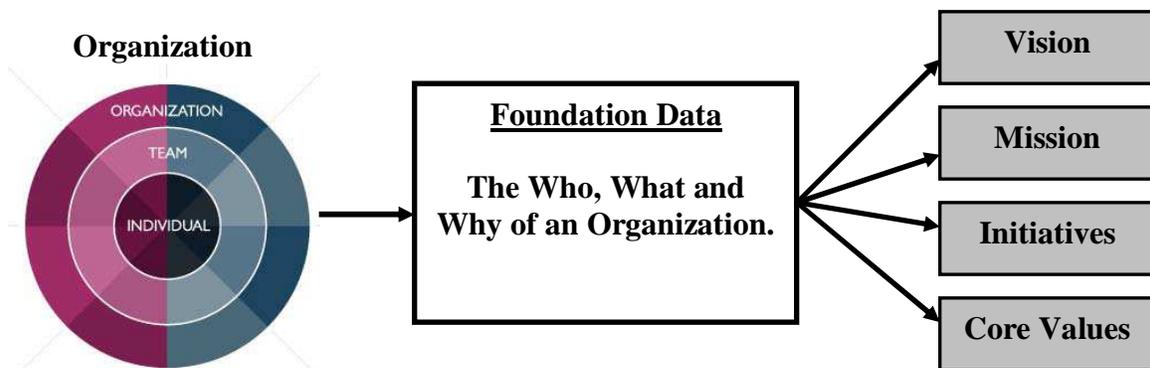
How Does KeyneLink Help an Organization Manage its Strategic Plan?

1. **Operationalizing Your Strategic Plan:** KeyneLink helps organizations link planning with all the required resources, talent and initiatives to execute the strategic plan. Managers and employees work together to connect department and individual goals to the organizational initiatives. As a result, KeyneLink ensures complete alignment between the strategic plan and all the goals down to an individual level.
2. **Communication:** At the core of KeyneLink system is ongoing communication and feedback, two characteristics that have proven time and time again to be the keys to successful execution management. Not only does the tool help managers communicate the strategic plan to the rest of the organization, but it allows them to lead and guide employees down the road as they travel. When communication takes place regularly, managers can easily assess performance, coach, train and distribute rewards.

Key Components of KeyneLink

Foundational Data: Foundation encompasses the organization's vision, mission, core values and initiatives.

Organization's Performance Managed through Foundation Data



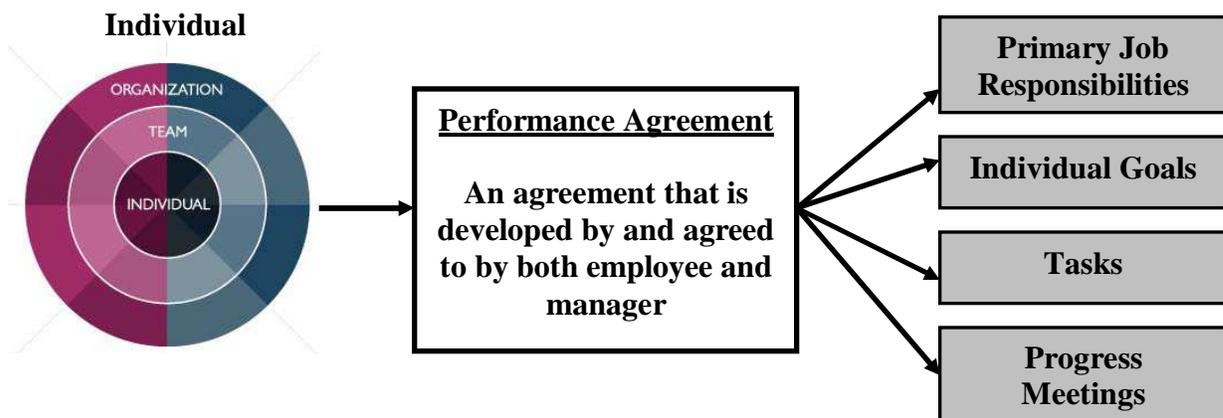
Core Values are defined as minimum behavioral standards. Core values get to the heart of employee interactions and behaviors.

Initiatives are the key organizational objectives and goals for the year. Individual and Team goals are then linked to the organizational initiatives.

Strategy Execution Performance Agreements: The performance agreement is an agreement between a manager and an employee and reflects the employee's commitments to executing the strategic plan. It consists of primary job responsibilities, goals and a schedule of progress meetings.

The manager and the employee meet to discuss the performance expectations and goals for the year and how they relate to the organization's strategic initiatives. The employee then enters the primary job responsibilities and goals into KeyneLink and submits them to the manager for approval. The progress meetings are scheduled by the manager and submitted to the employee for acceptance.

Individual's Performance Managed through Performance Agreements



Primary Job Responsibilities (PJR) consist of brief statements and descriptions of the main responsibilities of the employee.

Goals represent how each individual will be involved in helping the organization meet its yearly initiatives.

Tasks/Milestones are small, manageable activities that “step” you towards a goal.

Progress Meetings help ensure clarification and progress of expectations. Regular, ongoing communication is the key to any successful *strategy execution management* system.

The Performance Agreement

The screenshot displays the KeyneLink Performance Agreement interface for Taylor Gill. The interface is organized into several sections:

- Meetings:** A table listing scheduled meetings with columns for Status, Date And Time, Location, Performance Period, Action, and Details. Meetings are marked as 'Agreed' or 'Completed'.
- Primary Job Responsibilities:** A table listing responsibilities with columns for Status, Created On, Responsibility, and Performance Period. Responsibilities include 'Effectively manage cash', 'Accurate and timely generation of financial reports', 'Manage physical inventory and coordinate audit', 'Lead, manage, train and motivate staff', and 'Maintain product costing'.
- Goals:** A table listing goals with columns for Status, Type, Goal, Target, Weight, Scoring, Perf Factor, and Details. Goals include 'Analyze and Reduce Credit Memos', 'Open two new market segments', 'Attend professional financial seminar with hands on modeling targeting cash flow opportunities', 'Develop an overall cost reduction system and implement a tracking system to accompany it', 'Research and realize cost savings in plastic purchases', 'Attend controllers workshop', and 'Achieve cost savings target of \$25,000'.

Each section includes a legend for status icons (e.g., 'Awaiting Employee Acceptance', 'Agreed', 'Cancelled', 'Manager Never Finalized', 'Completed') and a 'View All Items' link.

The **Performance Agreement** is one of the most important components of KeyneLink. It is an agreement between a manager and an employee and reflects the employee's performance commitments. It consists of primary job responsibilities, goals and a schedule of bi-monthly (monthly) progress meetings. The screen shot above is an example of a performance agreement.

The manager and employee meet to discuss the performance expectations and goals for the year and how they relate to the organizational initiatives. The employee then enters the primary job responsibilities and goals into KeyneLink and submits them to the manager for approval. The bi-monthly (or monthly) meetings are scheduled by the manager and submitted to the employee for acceptance

It is important to note that nowhere in the performance agreement does it allow managers to enter data for the employees. Employees must enter the data themselves. Once the performance agreement has been submitted to the manager, he/she can make sure it's what they agreed to and can then approve them. Once the performance agreement has been approved it takes both the manager and the employee to be involved in any changes. Nothing happens in a vacuum.

Goal Detail

Goal Information

Goal: Achieve cost savings target of \$25,000
Benefit: Increase bottom line profit
Goal For: Bill Taylor

Goal Details

Status	Type	Create Date	Target Date	Weight	Performance Period
➔	Department/ Management	7/25/2008	5/19/2009	20	8/6/2008 - 8/5/2009

Measurement Criteria

Missed	Met	Exceeded
Saved company less than \$15,000	Saved company \$15,000 - \$30,000	Saved company over \$30,000

Supported Initiatives

- Create a minimum of 5 Centers of Excellence that will make a difference in the delivery of our Vision
- Produce a pre-tax profit of 11% in 2008 and 12% in 2009.

Tasks

Status	Description	Start	End	Details
1	Purchase new timeclock - create spreadsheet to show savings. Include actual cost vs. e-time rental and the fact that it is impossible to clock each other in.	8/6/2008	8/18/2008	
1	Phone system contract - create cost savings spreadsheet.	8/11/2008	8/20/2008	
2	Re-negotiate Acme's cell phone contract	8/25/2008	9/25/2008	
2	Implement a new payroll system.	8/24/2008	10/29/2008	
2	Cost savings -Network cable guy. Create spreadsheet that shows savings comparing future design and current provider	10/2/2008	11/1/2008	
2	Re-negotiate banking fees	11/25/2008	1/25/2009	

Goal Notes

There are no notes available

[Add Note](#)

The above screen shot is an example of **Goal Details** in KeyneLink. You can see the details of a particular goal including the goal description and the benefits of the goal. You can also see the type of goal, target date, the weighing, supported organizational initiatives and measurement criteria.

In KeyneLink, the goals measurement criteria are unique. Not only do the employee and manager agree on how to measure the goal, but also, what constitutes missed, met and exceeded. Which gets to the age-old question; how do we balance stretch goals with realistic goals? The stretch is built into the exceeded criteria.

All goals link back to the organizational initiatives so this is where you start getting a clear line of sight from vision to strategic plan to initiatives to all the goals within the organization down to an individual level.

The final part of the goal details shows all of the tasks/milestones associated with the goal. Tasks are small, manageable activities that “step” you towards your goal. Milestones are the “significant or important” events in the journey of accomplishing the goal.

Progress Meetings

Select New Options View PDF for printing Close Window

Meeting Packet

Name: Bill Taylor **Meeting Date:** 8/31/2008 at 7:30 AM
Title: CFO **Location:** Starbucks
Department: Finance
Manager: Jack Waters
Email: bill@demo-waden.com

Quick Score Summary

Primary Job Responsibilities			
Primary Job Responsibility	Employee	Manager	Final
Effectively manage cash.	2	1	<input type="text"/>
Accurate and timely generation of financial reports.	1	1	<input type="text"/>
Manage physical inventory and coordinate audit.	1	2	<input type="text"/>
Lead, manage, train and motivate staff.	2	1	<input type="text"/>
Maintain product costing.	1	0	<input type="text"/>

Core Values			
Core Value	Employee	Manager	Final
Integrity Do the right thing. Be honest. Be ethical.	1	1	<input type="text"/>
Professionalism First class in every respect - people, product and service.	1	1	<input type="text"/>
Respect Accept and appreciate others.	1	1	<input type="text"/>
Open Communication Tell it like it is. Timely communicate the good, the bad and the ugly.	1	1	<input type="text"/>
Responsibility Own the problem; seek the solution. Be accountable for your actions and results.	1	1	<input type="text"/>
Competitive Spirit Strive to innovate, improve and win.	1	1	<input type="text"/>
Commitment Do what it takes to reach the goal as long as it's moral and ethical.	1	0	<input type="text"/>
Productivity Achieve goals in a timely and efficient manner.	1	1	<input type="text"/>

Goals			
Goal	Employee	Manager	Final
Analyze and Reduce Credit Memos	1	1	<input type="text"/>
Open two new market segments	2	1	<input type="text"/>
Attend professional financial seminar with hands on modeling targeting cash flow opportunities.	2	1	<input type="text"/>
Develop an overall cost reduction system and implement a tracking system to accompany it.	1	0	<input type="text"/>
Research and realize cost savings in plastic purchases.	1	1	<input type="text"/>
Attend controllers workshop	1	1	<input type="text"/>
Achieve cost savings target of \$25,000	0	1	<input type="text"/>

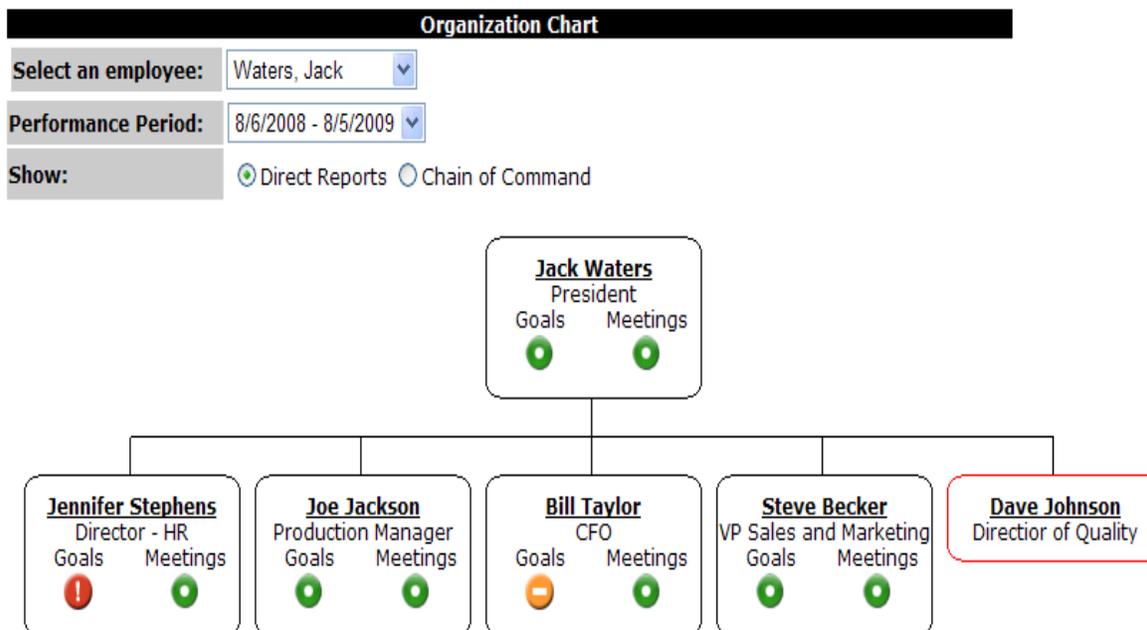
The above screen shot is an example of a **Progress Meeting** form. *Strategy execution management*, at its core, is clarification of expectations and communication. Regular, ongoing communication is the key to any successful execution management system. Without frequent communication, any execution management system will certainly fail to meet the expectations of the organization.

KeyneLink incorporates bi-monthly (monthly) progress meetings in order to significantly increase the execution management system's chances for success in a company. During this ongoing activity, each employee and their manager meets bi-monthly (monthly) to review the status of goals, primary job responsibilities, core values and the working relationship between the employee and manager.

Research clearly shows that if managers and employees were to talk on a regular basis about how the employee is performing and how the two of them can improve their working relationship it would improve performance across the board. Then, if you document it and talk about goals that are linked back to company's initiatives, it would improve even more.

Manager's View

My Department



KeyneLink has multiple dashboard views throughout its execution management system. This is an example of a dashboard view of a manager and their immediate direct reports. Because this is a web-based program the manager can be anywhere with Internet access and pull up KeyneLink and get real-time visibility into exactly what's going on with goals, initiatives and communication within the organization.

The system is hierarchical in terms of view so managers will always see everything they have responsibility for. Using the picture above, if I'm Jack Waters and I want to see what's going on four or five levels below me (if the organization goes that deep), I can. I could drill down and see specifically what's going on with any project or any individual at any point in time.

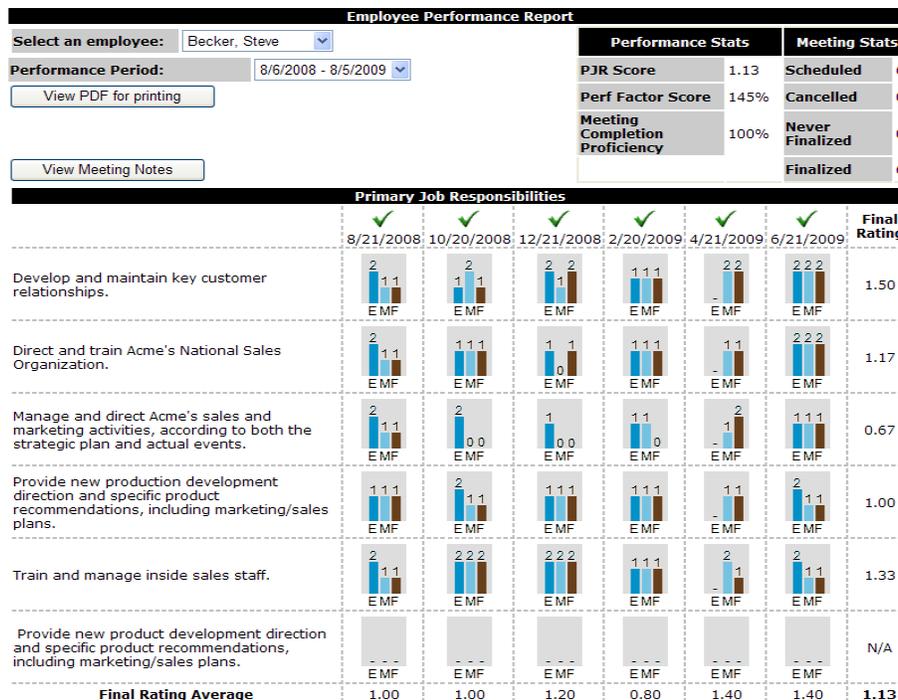
On this dashboard one can see a status for goals and meetings. If it's green, everything is on track. It turns yellow, like it did for Bill Taylor above, when he is past due on tasks or milestones associated with a goal, which is basically flagging the manager to click on Bill Taylor's name to see what's going on. It turns red, like it did for Jennifer above when she is past due on the goal itself or it hasn't been marked off as complete. Dave Johnson has a different shape border than the others and the border color is in red. This denotes that Dave Johnson does not have an approved performance agreement. The Meeting status is about the progress meetings, which really gets to the cornerstone of *strategy execution management*.

KeyneLink Reports

The KeyneLink reports' section contains a number of reports that will help manage execution and communication within the organization. For example:

- **Performance Agreement Status Report** shows a Pie Chart and detailed listings of the approved, not approved and closed performance agreements. The detailed report includes a summary of the specific data missing from those that are not yet approved.
- **Employee Performance Report** is a compilation of data from all progress meetings for a particular employee. This report could replace a performance appraisal. (See example below)
- **Goals by Initiative Report** is a listing of each organizational initiative and every goal (both individual and team) supporting it. This report can actually become a feedback loop back into an organization's strategic plan.
- **Initiative Progress Report** is the ultimate dashboard designed to keep your organizational initiatives at the forefront of everyone's minds. Everything associated with your company's initiatives, including goals, their progress and even the employee perceptions can be seen from this incredible report.
- **Feedback for Manager Report** is a summary of feedback gathered from all direct reports for a particular manager from all progress meetings.
- **Employee Rating Comparison Report** is a comparison of Performance Factor, Primary Job Responsibilities and Core Value ratings of all employees.

Employee Performance Report



The **Employee Performance Report** allows a manager to see everything going on with an employee all on one page. The entire report covers the employee’s primary job responsibilities, core values and their goals and objectives.

Looking at this graphic, this E, M, and F ...stands for the employee's pre-score... the manager's pre-score... and the final rating. Please note that the scores to the far right only include the final ratings; they're not counting the pre-scores. You can also view all of the meeting notes and comments from both manager and employee.

Initiative Progress Report



The **Initiative Progress Report** is designed to keep your organizational initiatives at the forefront of everyone’s minds. The dashboard view allows you to instantly see the initiative, how many goals are linked to it, how it’s progressing and even the employees perception of how it’s doing. By clicking on any of the underlined words or numbers you can bring up reports that will let you see all of the supporting data.

For example, the “Current Average Progress Rating” (shows 1.00 above) will give you an indication of how employees feel the organization is progressing on each initiative. By clicking on the number you’ll be able to see how many people feel the organization is doing well, how many don’t know how it’s doing and how many don’t understand what the organization is trying to accomplish.

The “Avg Goal Rating” (shows 0.94 above) indicates the average current progress rating of all open goals linked to the initiative. You can click on this number to bring up a report that lists the goal, the associated person or team lead, the manager and the last progress rating.

This is a very comprehensive report that ties in all of the data from everyone’s performance agreements and progress meetings. You have to see for yourself all it can do!

Final Comments:

KeyneLink is a very dynamic and unique system. It's simple to use and adjusts to the speed of your business. It's based on sound leadership principles and brings clarity to common sense. Maybe the most unique feature of the KeyneLink system is that you can start out as slowly as you like. Then as you get comfortable with the system you can go as fast and deep throughout your organization as you see fit.

KeyneLink's *strategy execution management* system is designed to facilitate quality communication between the manager and the employee. Therefore, as an organization, you're able to actively and dynamically manage execution, not just measure and review performance because **managing execution is critical in today's environment!**

About Gary:

Gary's style in working with his KeyneLink clients is to guide them through every facet of the implementation. No client is left on their own to figure things out for themselves. Gary consults with the senior executives to clarify and articulate the foundation data and organizational initiatives. He then coaches the managers and their direct reports in writing proper goals and defining their measurement criteria. And finally, he teaches the organization how to use KeyneLink effectively and how to cascade it successfully throughout the entire company.

For more information or to see a demonstration on KeyneLink please contact Gary Tomlinson at (919) 847-6235 or gary@gary-tomlinson.com.