



Tomlinson & Associates Presents
KeyneLink's
Executive Summary Brief



Over 75% 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 80% 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 organizational excellence. 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.

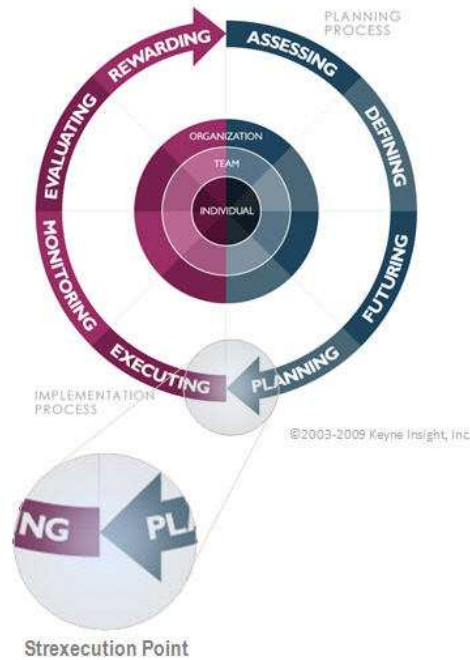
Tomlinson & Associates uses KeyneLink’s *strategy execution management* system to help clients clarify and achieve their organizational initiatives because in today’s economic environment, **Results Rule!**

The following pages give a good 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 me a call at (919) 847-6235.

Thank you,

Gary Tomlinson
Tomlinson & Associates
www.gary-tomlinson.com

Tomlinson & Associates' KeyneLink *Strategy Execution Management System*



Strexecution Point:

The *Strexecution Point* is the point of transition between strategy 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!

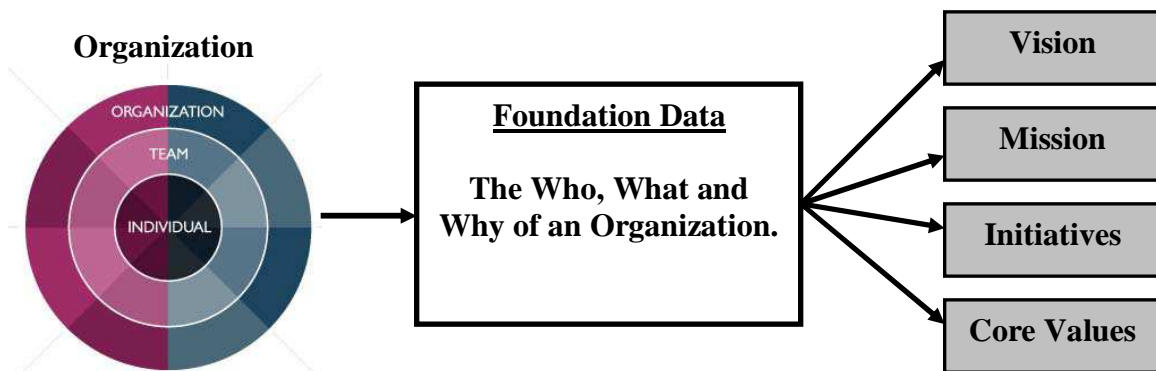
How Does KeyneLink Help an Organization Manage its Strategic Plan?

1. **Operationalizing Your Strategic Plan:** KeyneLink helps organizations link planning with the execution of a 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, there's no need for a formal appraisal at the end of the year. Instead, at the end of the year, managers can easily tie up loose ends 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



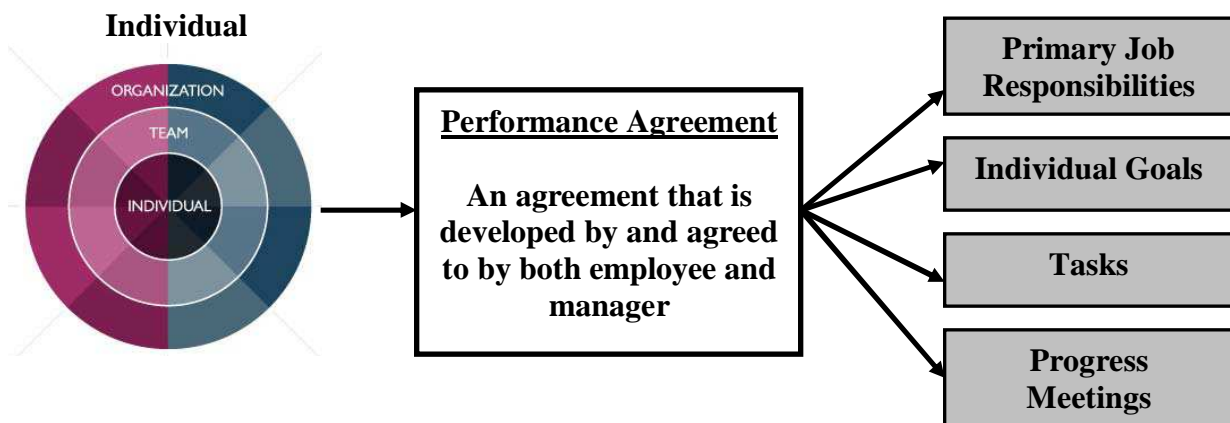
Core Values are defined as minimum behavioral standards. Core values get to the heart of employee interactions and behaviors.

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

Performance Agreements: The performance agreement 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 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 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

Meetings

Status	Date And Time	Location	Performance Period	Action	Details
✓	8/21/2008 8:23 AM	Starbucks	8/6/2008 - 8/5/2009	N/A	
✓	8/23/2008 10:04 AM	Starbucks	8/6/2008 - 8/5/2009	N/A	
✓	8/24/2008 10:34 AM	Broken Spoke	8/6/2008 - 8/5/2009	N/A	
✓	8/25/2008 9:18 AM	Applebee's	8/6/2008 - 8/5/2009	N/A	
✓	8/25/2008 3:03 PM	Starbucks	8/6/2008 - 8/5/2009	N/A	
H	8/31/2008 7:30 AM	Starbucks	8/6/2008 - 8/5/2009	View score	
H	12/29/2008 7:30 AM	Starbucks	8/6/2008 - 8/5/2009	N/A	
H	3/8/2009 7:30 AM	Starbucks	8/6/2008 - 8/5/2009	N/A	

Meetings Key

Awaiting Employee Acceptance Awaiting Manager Acceptance H Agreed X Cancelled Manager Never Finalized Completed

Primary Job Responsibilities

Status	Created On	Responsibility	Performance Period	Details
H	8/28/2008	Effectively manage cash.	8/6/2008 - 8/5/2009	
H	8/28/2008	Accurate and timely generation of financial reports.	8/6/2008 - 8/5/2009	
H	8/28/2008	Manage physical inventory and coordinate audit.	8/6/2008 - 8/5/2009	
H	8/28/2008	Lead, manage, train and motivate staff.	8/6/2008 - 8/5/2009	
H	8/28/2008	Maintain product costing.	8/6/2008 - 8/5/2009	

Primary Job Responsibilities Key

NS Not Submitted Awaiting Employee Acceptance Awaiting Manager Acceptance H Agreed X Deactivated

Goals

Status	Type	Goal	Target	Weight	Scoring	Eff. Factor	Details
●	Sponsored Team Goal	Analyze and Reduce Credit Memos	12/31/2008	10	-	0%	
●	Sponsored Team Goal	Open two new market segments	7/1/2009	20	-	0%	
●	Professional Development	Attend professional financial seminar with hands on modeling targeting cash flow opportunities.	11/18/2008	5	-	0%	
●	Department/Management	Develop an overall cost reduction system and implement a tracking system to accompany it.	3/19/2009	20	-	0%	
●	Department/Management	Research and realize cost savings in plastic purchases.	4/8/2009	20	-	0%	
●	Professional Development	Attend controllers workshop	4/28/2009	5	-	0%	
●	Department/Management	Achieve cost savings target of \$25,000	5/19/2009	20	-	0%	

Goal Key

NS Not Submitted ● On Target ● Task Past Due ● Past Due H Awaiting Final Deactivation X Deactivated

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 (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

KEYNE Link™

Home My Performance **My Department** Senior Executive Menu Reports

(Demo) Welcome Jack Waters [Logout] Your session expires in: 30 minutes. [Refresh Session]

My Department

- My Department
- Organization Charts
- Performance Agreements
- All Items
- Meetings
- Primary Job Responsibilities
- Goals
 - Goal
 - Initiative
 - Adjustor
 - Goal Weight
 - Adjustor
 - Tasks
 - Accolades and Concerns
 - Employees

Goal Information

Goal: Achieve cost savings target of \$25,000
 Benefits: 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
●	Purchase new timeslock - 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	
●	Phone system contract - create cost savings spreadsheet	8/11/2008	8/20/2008	
●	Re-negotiate Acme's cell phone contract	8/25/2008	9/25/2008	
●	Implement a new payroll system	8/24/2008	10/29/2008	
●	Cost savings -Network cable guy. Create spreadsheet that shows savings comparing future design and current provider	10/2/2008	11/1/2008	
●	Re-negotiate banking fees	11/25/2008	1/25/2009	

There are no notes available

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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 exceed 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.

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"/>

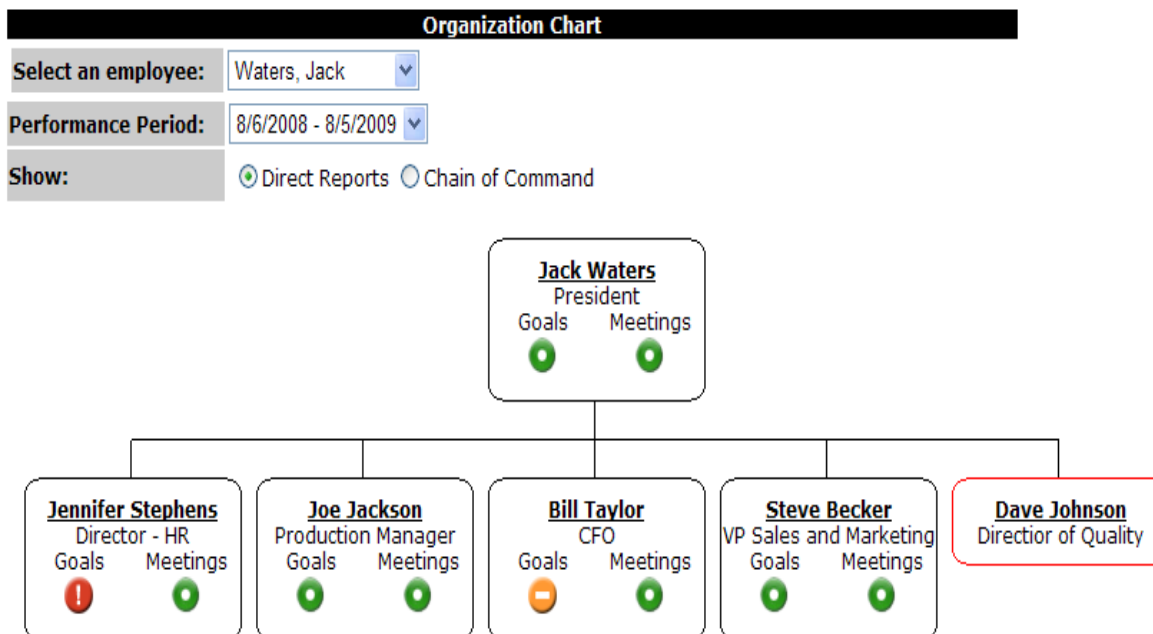
The above screen shot is an example of a **Progress Meeting** form. *Strategy execution management*, at its core, is clarification of expectations and communication. Regular, ongoing communication is the key to any successful execution management system. Without frequent communication, any execution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

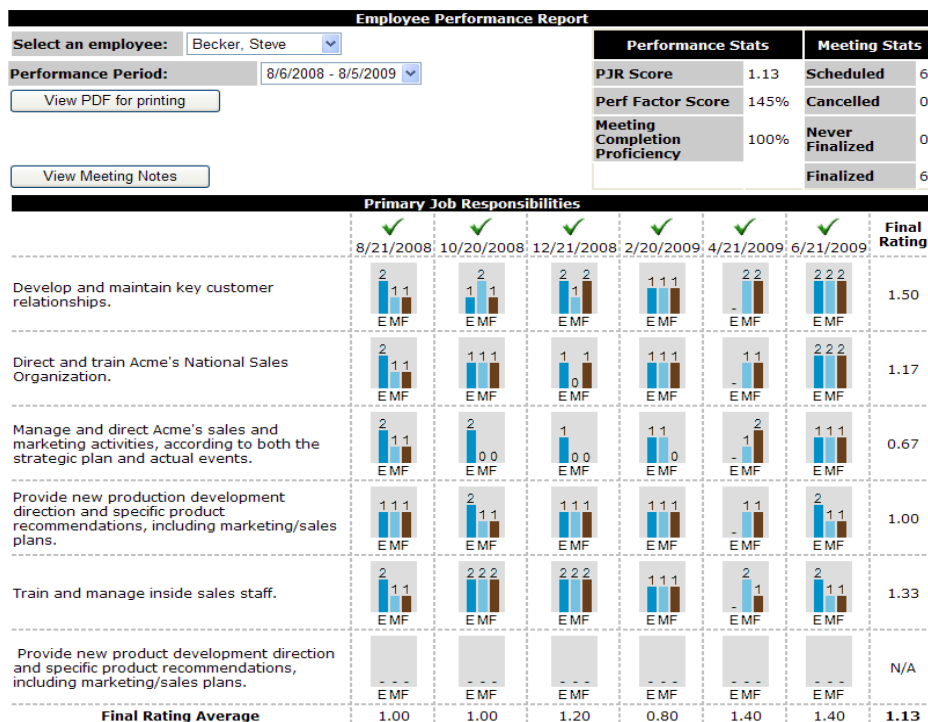
On this dashboard one can see a status for goals and meetings. If it's green, everything is on track. It turns yellow, like it did for Bill Taylor above, when they're past due on tasks or milestones associated with a goal, which is basically flagging the manager to click on Bill Taylor's name to see what's going on. It turns red, like it did for Jennifer above when they're 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.
- **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.

Final Comments:

KeyneLink is a very dynamic and unique system. It is simple to use and adjusts to the speed of your business. It is 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. Managing execution is critical in today's environment!

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